REQUEST FOR PROPOSAL

EMPLOYEE BENEFITS BROKER/CONSULTANT

PROPOSED EFFECTIVE DATE: JANUARY 1, 2019

Release Date: Thursday, October 4, 2018

Due Date: 2:00PM CDT, Thursday, October 25, 2018

Prepared by:

Park Hill School District
NOTICE OF REQUEST FOR PROPOSAL

The Park Hill School District (the District) is accepting proposals for the following:

Employee Benefits Broker/Consultant

Interested firms are asked to formally notify Park Hill School District with a written intent to respond notice by 5:00PM CDT, Monday, October 15, 2018.

Sealed proposals will be accepted no later than 2:00PM CDT, Thursday, October 25, 2018 and all proposals should be clearly labeled as Employee Benefits Broker/Consultant Proposal and be received at

Park Hill School District
7703 NW Barry Road
Kansas City, Missouri  64153

District will conduct Firm/Proposal interviews at the Park Hill School District on November 2, 2018. Bidder and proposal interviews will be granted at the sole discretion of the District.

This Request for Proposal is available in the District Office, on the district website, and requests for copies may be made by phone at (816) 359-4021. The updated version of the RFP will be available at http://tinyurl.com/phsdproposals.

PURPOSE

The Park Hill School District hereby solicits qualified and interested licensed Group Benefit Broker/Consultants to submit proposals and statements of qualifications for providing all supervision, labor, services, equipment, hardware, software, materials, and any assistance necessary to provide the District with Group Benefit Broker/ Consulting services. The services are to be provided for the Human Resources/Business Services departments of the District. The District is interested in appointing a single brokerage source as their Broker/Consultant of Record with a minimum of five (5) years local experience and a proven service record with governmental entities similar to the size and scope of the District within the Kansas City geographic area.
## TABLE OF CONTENTS

NOTICE OF REQUEST FOR PROPOSAL ........................................................................................................... 2
PURPOSE ......................................................................................................................................................... 2

SECTION A | GENERAL DATA .............................................................................................................................. 5
A01. The Park Hill School District .......................................................................................................................... 5
    A01.01 District Vision, Mission, Values and Goals ............................................................................................ 5
    A01.02 District Geography ................................................................................................................................ 6
    A01.03 District Employees ............................................................................................................................... 6
    A01.04 Student Enrollment .............................................................................................................................. 6
    A01.05 Other Information ............................................................................................................................... 6
A02. Active Employee Benefit Premium Contributions ......................................................................................... 7
A03. District Federal ID ........................................................................................................................................ 7
A04. 2019 Employee Benefit Program .............................................................................................................. 7
A05. 2018 Employee Benefit Plan Summaries .................................................................................................... 8
A06. Enrollment Period ....................................................................................................................................... 8
A07. 2019 premiums ........................................................................................................................................... 9
A08. 2018 Enrollment........................................................................................................................................ 10
A09. Incumbent Broker/Consultant .................................................................................................................... 13
A10. Employee Benefit funding ........................................................................................................................... 13
A11. District Employee Wellness ........................................................................................................................ 13
    A.11.01 Wellness Programs ............................................................................................................................ 13
    A.11.02 Fitness Center ................................................................................................................................... 13
    A.11.03 Employee Discounts .......................................................................................................................... 14

SECTION B | PROPOSAL PROCEDURES ..................................................................................................................... 15
B01. Intent to Respond ....................................................................................................................................... 15
B02. Proposal Questions and Clarifications ........................................................................................................ 15
B03. Proposal Modifications and Cancelations .................................................................................................. 15

B04. Proposal Due Date and Time ...................................................................................................................... 16
B05. Confidentiality ............................................................................................................................................ 16
B06. Signature Sheet .......................................................................................................................................... 16
B07. Proposals Binding ....................................................................................................................................... 16
B08. Negotiation ............................................................................................................................................... 16
B09. Rights Reserved ....................................................................................................................................... 17
B10. Number of Plans ....................................................................................................................................... 17
B11. Contract Period ........................................................................................................................................... 17
B12. Termination ................................................................................................................................................ 17
    B12.01 Termination For Convenience .......................................................................................................... 17
    B12.02 Termination for Cause ....................................................................................................................... 17
    B12.03 Termination Due to Unavailability of funds ....................................................................................... 18
B13. Expenses ............................................................................................................................................... 18

B14. Governing Law .......................................................................................................................................... 18
B15. Tax Exemption .......................................................................................................................................... 18
B16. Disclaimer of Liability ............................................................................................................................... 18
B17. Hold Harmless .......................................................................................................................................... 18
B18. Assignment ............................................................................................................................................... 19
B19. Specifications ............................................................................................................................................ 19
B20. Anti-Discrimination Clause ...................................................................................................................... 19
B21. No Contact Policy .................................................................................................................................... 19
B22. Conflict of Interest ................................................................. 19
23. Insurance .................................................................................. 20
B24. Selection Process ..................................................................... 20
B25. Rating Criteria ......................................................................... 20
B26. Basis for Award ....................................................................... 21
B28. Interview ............................................................................... 21
B29. Timeline ................................................................................ 21
SECTION C | Proposal Requirements .................................................. 23
C01. GENERAL SCOPE OF SERVICES ............................................. 23
    C01.01 History of the Firm .............................................................. 23
    C01.02 Scope of Services ............................................................... 24
    C01.03 Firm Representation .......................................................... 26
    C01.04 Proactive Transparency of service costs and compensation .... 26
    C01.05 Program Analysis .............................................................. 26
    C01.06 Claims Analysis ................................................................. 27
    C01.07 Communication ................................................................. 27
    C01.08 Employee Surveys .............................................................. 27
    C01.09 Legislative updates / Regulatory & compliance Support ......... 27
    C01.10 Employee Wellness ............................................................ 27
    C01.11 Summary ...................................................................... 27
C02. ENROLLMENT SERVICES ....................................................... 27
    C02.01 Open Enrollment Staffing .................................................. 27
    C02.02 Open Enrollment Materials ................................................. 28
    C02.03 Predictive Modeling ......................................................... 28
    C02.04 Benefit Statements / Benefit Calculators ......................... 28
C03. RENEWAL and MARKETING ............................................... 28
    C03.01 Renewal Timeline ............................................................. 28
    C03.02 Renewal Services ............................................................. 29
    C03.03 Funding Analysis ............................................................. 29
C04. FEES/COMMISSIONS .............................................................. 29
    C04.01 Cost Structure ................................................................. 29
    C04.02 Fees to District ................................................................. 30
    C04.03 Broker fees ................................................................. 30
    C04.04 Unique Services ............................................................. 30
C05 EXPERIENCE OF FIRM ......................................................... 30
    C05.01 Use of Subcontractors ...................................................... 30
    C05.02 Professional Development of Staff .................................... 30
    C05.03 Seminars & Workshops ................................................... 30
    C05.04 References ................................................................. 31
    C05.05 Former Clients ............................................................... 31
    C05.06 Client Funding ............................................................... 31
    C05.07 Balance of Business ........................................................ 31
C06. INSURER RELATIONS ......................................................... 31
    C06.01 Working Agreements with Health Carriers ....................... 31
    C06.02 Blue Chip Broker .......................................................... 32
FECONVAMITION NOTIFICATION ................................................. 33
FEDERAL WORK AUTHORIZATION PROGRAM ("E-VERIFY") ADDENDUM ............................................. 34
FEDERAL WORK AUTHORIZATION PROGRAM AFFIDAVIT .................. 35
SIGNATURE SHEET ...................................................................... 36
Park Hill Benefit Broker Fees (Blank) ............................................... 37
A01.01 DISTRICT VISION, MISSION, VALUES AND GOALS

Park Hill School District’s culture of high expectations and continuous improvement is guided by the tenets of a professional learning community with a shared vision, mission, and values. The district focuses upon identified strategic focus areas and articulated goals within a five year strategic plan that are aligned with student and stakeholder requirements/expectations. Staff members utilize collective inquiry, collaborative teams, and an action orientation to accomplish the goals of the district.

Through a collaborative process, the Park Hill School District Board of Education and senior leaders have defined the vision, mission, and values of the school district.

The vision of the district is:

Building Successful Futures • Each Student • Every Day

The mission is:

Through the expertise of an engaged staff, the Park Hill School District provides a relevant education in a safe, caring environment to prepare each student for success in life.

The values of the district have been identified as:

Student Focus
Integrity
High Expectations
Continuous Improvement
Visionary Leadership
Equity

As a part of the district’s ongoing efforts to align actions with strategic goals, prospective school district partners and vendors are strongly encouraged to familiarize themselves with the school district’s strategic plan.

The plan can be found at http://www.parkhill.k12.mo.us/cms/one.aspx?portalid=62500&pageid=781531.
A01.02 DISTRICT GEOGRAPHY

The Park Hill School District, formally organized in 1951 under the provisions of Missouri’s School Reorganization Statute of 1948, encompasses 71 square miles located in the southern third of Platte County, located just north of downtown Kansas City, Missouri.

Park Hill is a public school district, with pre-kindergarten (pre-K) programs through grade 12. The district includes ten elementary schools, three middle schools (including a sixth grade center), two high schools, a day treatment school (Russell Jones Education Center), and the Gerner Family Early Education Center. Other support facilities include a district Aquatic Center, Underground Support Services, and the District Office. In 2017, the district opened the LEAD Innovation Studio, a high school program that serves students from both high schools. In August, 2019, the district is planning to open Hopewell Elementary School and Walden Middle School, both new facilities that will address enrollment growth.

Predominantly rural-oriented in the past, Park Hill has steadily changed to a more suburban district, blending both residential and commercial growth. Approximately 43% of the school district lies within the city limits of Kansas City, Missouri. There are seven other incorporated communities including Riverside, Parkville, Houston Lake, Lake Waukomis, Weatherby Lake, Platte Woods, and Northmoor, as well as the unincorporated communities of Waldron and Platte County.

A01.03 DISTRICT EMPLOYEES

The District has approximately 650 classified staff and 870 certified staff.

Thirty (30) hours or more per week active employees are eligible for group benefits. Approximately 1,500 employees enroll in the group health benefit program.

Approximately 450 retirees participate in various health, dental, and/or vision options. Per Missouri Revised Statute Section 169.590.1, retirees are to receive benefits at the same rate as all other members of the group.

A01.04 STUDENT ENROLLMENT

Estimated student enrollment for the current school year approximates 11,700 (K-12). An additional 350 pre-school students attend the Gerner Early Childhood Education Center.

A01.05 OTHER INFORMATION

Other information, including the annual district Demographic Profile, Long-Range Facility Plan and District Budget, can be found at: http://www.parkhill.k12.mo.us. Firms are encouraged to review these documents to better familiarize themselves with the district.
A02. ACTIVE EMPLOYEE BENEFIT PREMIUM CONTRIBUTIONS

Any premium contributions required are paid via payroll deduction for active employees. A Section 125 plan is used for health, dental and vision premium contributions, which includes medical, and dependent care.

Active employees who choose to decline coverage do not obtain any monetary benefit.

A03. DISTRICT FEDERAL ID

The District’s Federal Identification Number is 44-6003842.

A04. 2019 EMPLOYEE BENEFIT PROGRAM

In Summer, 2018, with guidance from our incumbent broker, the district released a Request for Proposal (RFP) for all employee benefit lines of coverage.

After an extensive evaluation process, the Board of Education approved the following benefit carriers effective January 1, 2019. Plans and final rates are currently being finalized for the October, 2018 enrollment and January 1, 2019 renewal date.

<table>
<thead>
<tr>
<th>Line of Coverage</th>
<th>Types</th>
<th>Recommended Carrier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical</td>
<td>Employer Paid</td>
<td>Blue Cross and Blue Shield of Kansas City (BCBSKC) (Fully Insured)</td>
</tr>
<tr>
<td></td>
<td>Voluntary Buy-Up</td>
<td></td>
</tr>
<tr>
<td></td>
<td>+1 and Family Options</td>
<td></td>
</tr>
<tr>
<td>Dental</td>
<td>Employer Paid</td>
<td>Blue Cross and Blue Shield of Kansas City (BCBSKC)</td>
</tr>
<tr>
<td></td>
<td>+1 and Family Options</td>
<td></td>
</tr>
<tr>
<td>Vision</td>
<td>Employer Paid</td>
<td>Vision Service Plan</td>
</tr>
<tr>
<td></td>
<td>Family Option</td>
<td></td>
</tr>
<tr>
<td>Life and Accidental Death and Dismemberment (AD&amp;D) Insurance</td>
<td>Employer Paid Employee, Spouse &amp; Dependent Options</td>
<td>OCHS (Minnesota Life)</td>
</tr>
<tr>
<td>Long-Term Disability Insurance</td>
<td>Employer Paid</td>
<td>Cigna</td>
</tr>
<tr>
<td></td>
<td>Employee Paid Options</td>
<td></td>
</tr>
<tr>
<td>Section 125 Flexible Spending Accounts</td>
<td>Employee Paid</td>
<td>Tri-Star Systems</td>
</tr>
<tr>
<td>Short-term Disability</td>
<td>Employee Paid Options</td>
<td>Lincoln Financial Group</td>
</tr>
<tr>
<td>Legal Plan</td>
<td>Employee Paid</td>
<td>MetLaw</td>
</tr>
<tr>
<td>Automobile &amp; Homeowners</td>
<td>Employee Paid Options</td>
<td>MetLife</td>
</tr>
</tbody>
</table>

Retirement Plan services were not included in the RFP. It is anticipated that the district will retain the carriers above for 2019, 2020, 2021. The selected firm will assist in negotiating premiums annually (for annual contracts and rate agreements), as well as preparing and conducting an extensive RFP process for all lines of coverage for January 1, 2022.
All lines of coverage have been priced with and without commissions. The decision to pay premiums with or without commissions will be made after selecting the broker/consultant.

A05. 2018 EMPLOYEE BENEFIT PLAN SUMMARIES

2018 enrollment, contribution and various summaries are available upon specific request with the proposal contact and are to be handled on a confidential basis.

Plans and final rates are currently being finalized for the October, 2018 enrollment and January 1, 2019 renewal date.

A06. ENROLLMENT PERIOD

The District Open Enrollment period is October-November (with benefit and rate changes effective on January 1), life-changing events are the only other times during the Plan Year that one can apply to make changes to insurance benefit coverages. These events include: marriage, divorce, birth, adoption, death, or a change in employment status (part-time to full-time, full-time to part-time, or termination of employment) for either employee or employee’s spouse. These events open a 30-day window to make an application for changes in coverage.

When enrolling or applying for coverage changes, all necessary forms are obtained and processed through the online enrollment system by staff and the District’s Benefits Department.
### Health Plan I - SPIRA - Blue Select Plus - HDHP

<table>
<thead>
<tr>
<th></th>
<th>Annual Premium</th>
<th>Monthly Premium</th>
<th>District Contribution</th>
<th>Employee Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee</strong></td>
<td>$5,532.00</td>
<td>$461.00</td>
<td>$(542.00)</td>
<td>$81.00</td>
</tr>
<tr>
<td><strong>Employee + 1</strong></td>
<td>$10,656.00</td>
<td>$888.00</td>
<td>$(542.00)</td>
<td>$346.00</td>
</tr>
<tr>
<td><strong>Family</strong></td>
<td>$19,692.00</td>
<td>$1,641.00</td>
<td>$(542.00)</td>
<td>$1,099.00</td>
</tr>
</tbody>
</table>

* Employees choosing the Employee Only SPIRA BlueSelect Plus HDHP plan will receive a Health Savings Account (HSA) contribution of $486 in January. Active employees will receive the remaining $486 contribution in July or after they return to work for the new school year.

### Health Plan 2 - Core A - Blue Select Plus - HDHP

<table>
<thead>
<tr>
<th></th>
<th>Annual Premium</th>
<th>Monthly Premium</th>
<th>District Contribution</th>
<th>Employee Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee</strong></td>
<td>$5,748.00</td>
<td>$479.00</td>
<td>$(542.00)</td>
<td>$63.00</td>
</tr>
<tr>
<td><strong>Employee + 1</strong></td>
<td>$11,088.00</td>
<td>$924.00</td>
<td>$(542.00)</td>
<td>$382.00</td>
</tr>
<tr>
<td><strong>Family</strong></td>
<td>$20,496.00</td>
<td>$1,708.00</td>
<td>$(542.00)</td>
<td>$1,166.00</td>
</tr>
</tbody>
</table>

* Employees choosing the Employee Only Core A HDHP BlueSelect Plus plan will receive a Health Savings Account (HSA) contribution of $378 in January. Active employees will receive the remaining $378 contribution in July or after they return to work for the new school year.

### Health Plan 3 - Core B - Preferred Care Blue - HDHP

<table>
<thead>
<tr>
<th></th>
<th>Annual Premium</th>
<th>Monthly Premium</th>
<th>District Contribution</th>
<th>Employee Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee</strong></td>
<td>$6,504.00</td>
<td>$542.00</td>
<td>$(542.00)</td>
<td>-</td>
</tr>
<tr>
<td><strong>Employee + 1</strong></td>
<td>$12,396.00</td>
<td>$1,033.00</td>
<td>$(542.00)</td>
<td>$491.00</td>
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<tr>
<td><strong>Family</strong></td>
<td>$22,908.00</td>
<td>$1,909.00</td>
<td>$(542.00)</td>
<td>$1,367.00</td>
</tr>
</tbody>
</table>

### Health Plan 4 - Buy Up I - Blue Select Plus - Traditional

<table>
<thead>
<tr>
<th></th>
<th>Annual Premium</th>
<th>Monthly Premium</th>
<th>District Contribution</th>
<th>Employee Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee</strong></td>
<td>$6,744.00</td>
<td>$562.00</td>
<td>$(542.00)</td>
<td>$20.00</td>
</tr>
<tr>
<td><strong>Employee + 1</strong></td>
<td>$12,960.00</td>
<td>$1,080.00</td>
<td>$(542.00)</td>
<td>$538.00</td>
</tr>
<tr>
<td><strong>Family</strong></td>
<td>$23,940.00</td>
<td>$1,995.00</td>
<td>$(542.00)</td>
<td>$1,453.00</td>
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</table>

### Health Plan 5 - Buy Up II - Preferred Care Blue - Traditional

<table>
<thead>
<tr>
<th></th>
<th>Annual Premium</th>
<th>Monthly Premium</th>
<th>District Contribution</th>
<th>Employee Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee</strong></td>
<td>$7,560.00</td>
<td>$630.00</td>
<td>$(542.00)</td>
<td>$88.00</td>
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<tr>
<td><strong>Employee + 1</strong></td>
<td>$14,532.00</td>
<td>$1,211.00</td>
<td>$(542.00)</td>
<td>$669.00</td>
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<tr>
<td><strong>Family</strong></td>
<td>$26,880.00</td>
<td>$2,240.00</td>
<td>$(542.00)</td>
<td>$1,698.00</td>
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</tbody>
</table>

### Dental - BCBS

<table>
<thead>
<tr>
<th></th>
<th>Annual Premium</th>
<th>Monthly Premium</th>
<th>District Contribution</th>
<th>Employee Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee</strong></td>
<td>$327.84</td>
<td>$27.32</td>
<td>$(27.32)</td>
<td>-</td>
</tr>
<tr>
<td><strong>Employee + 1</strong></td>
<td>$699.96</td>
<td>$58.33</td>
<td>$(27.32)</td>
<td>$31.01</td>
</tr>
<tr>
<td><strong>Family</strong></td>
<td>$1,101.72</td>
<td>$91.81</td>
<td>$(27.32)</td>
<td>$64.49</td>
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</table>

### Vision - Vision Service Plan (VSP)

<table>
<thead>
<tr>
<th></th>
<th>Annual Premium</th>
<th>Monthly Premium</th>
<th>District Contribution</th>
<th>Employee Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee</strong></td>
<td>$91.80</td>
<td>$7.65</td>
<td>$(7.65)</td>
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</tr>
<tr>
<td><strong>Family</strong></td>
<td>$249.84</td>
<td>$20.82</td>
<td>$(7.65)</td>
<td>$13.17</td>
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</tbody>
</table>

### Life- Ochs (Minnesota Life)

<table>
<thead>
<tr>
<th></th>
<th>Annual Premium</th>
<th>Monthly Premium</th>
<th>District Contribution</th>
<th>Employee Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee</strong></td>
<td>$33.60</td>
<td>$2.80</td>
<td>$(2.80)</td>
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</tr>
</tbody>
</table>

* New Hires - Insurance begins on the first of the month following date of hire. Insurance Premiums good until December 31, 2019*
Open enrollment for the plans listed above (2019) begins in October, 2018. Enrollment counts for the 2018 plans are listed below.

<table>
<thead>
<tr>
<th>Product</th>
<th>Option</th>
<th>Tier</th>
<th>Count</th>
<th>Employee Cost (Monthly)</th>
<th>Employer Cost (Monthly)</th>
<th>Total Monthly Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical</td>
<td>Buy Up I Blue Select Plus</td>
<td>Employee Only</td>
<td>270</td>
<td>$6,210</td>
<td>$140,400</td>
<td>$146,610</td>
</tr>
<tr>
<td>Medical</td>
<td>Buy Up I Blue Select Plus</td>
<td>Employee Plus One</td>
<td>9</td>
<td>$4,716</td>
<td>$4,680</td>
<td>$9,396</td>
</tr>
<tr>
<td>Medical</td>
<td>Buy Up I Blue Select Plus</td>
<td>Family</td>
<td>1</td>
<td>$1,409</td>
<td>$520</td>
<td>$1,929</td>
</tr>
<tr>
<td>Medical</td>
<td>Buy Up I Blue Select Plus</td>
<td>Special Employee Plus One</td>
<td>3</td>
<td>$12</td>
<td>$3,120</td>
<td>$3,132</td>
</tr>
<tr>
<td>Medical</td>
<td>Buy Up II Preferred Care Blue</td>
<td>Employee Only</td>
<td>97</td>
<td>$8,804</td>
<td>$50,269</td>
<td>$59,073</td>
</tr>
<tr>
<td>Medical</td>
<td>Buy Up II Preferred Care Blue</td>
<td>Employee Plus One</td>
<td>8</td>
<td>$5,208</td>
<td>$4,160</td>
<td>$9,368</td>
</tr>
<tr>
<td>Medical</td>
<td>Buy Up II Preferred Care Blue</td>
<td>Special Employee Plus One</td>
<td>1</td>
<td>$131</td>
<td>$1,040</td>
<td>$1,171</td>
</tr>
<tr>
<td>Medical</td>
<td>Core Plan A HDHP Blue Select Plus</td>
<td>Employee Only</td>
<td>456</td>
<td>$233</td>
<td>$211,808</td>
<td>$212,040</td>
</tr>
<tr>
<td>Medical</td>
<td>Core Plan A HDHP Blue Select Plus</td>
<td>Employee Plus One</td>
<td>50</td>
<td>$18,700</td>
<td>$26,000</td>
<td>$44,700</td>
</tr>
<tr>
<td>Medical</td>
<td>Core Plan A HDHP Blue Select Plus</td>
<td>Family</td>
<td>18</td>
<td>$20,410</td>
<td>$9,326</td>
<td>$29,736</td>
</tr>
<tr>
<td>Medical</td>
<td>Core Plan A HDHP Blue Select Plus</td>
<td>Special Employee Plus One</td>
<td>18</td>
<td>$-</td>
<td>$16,092</td>
<td>$16,092</td>
</tr>
<tr>
<td>Medical</td>
<td>Core Plan B HDHP Preferred Care Blue</td>
<td>Special Family</td>
<td>15</td>
<td>$9,180</td>
<td>$15,600</td>
<td>$24,780</td>
</tr>
<tr>
<td>Medical</td>
<td>Core Plan B HDHP Preferred Care Blue</td>
<td>Employee Only</td>
<td>313</td>
<td>$520</td>
<td>$162,240</td>
<td>$162,760</td>
</tr>
<tr>
<td>Medical</td>
<td>Core Plan B HDHP Preferred Care Blue</td>
<td>Employee Plus One</td>
<td>18</td>
<td>$8,604</td>
<td>$9,360</td>
<td>$17,964</td>
</tr>
<tr>
<td>Medical</td>
<td>Core Plan B HDHP Preferred Care Blue</td>
<td>Family</td>
<td>8</td>
<td>$10,608</td>
<td>$4,160</td>
<td>$14,768</td>
</tr>
<tr>
<td>Medical</td>
<td>Core Plan B HDHP Preferred Care Blue</td>
<td>Special Employee Plus One</td>
<td>5</td>
<td>$-</td>
<td>$4,990</td>
<td>$4,990</td>
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<td>Medical</td>
<td>Core Plan B HDHP Preferred Care Blue</td>
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<td>1</td>
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<td>Dental</td>
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<td>989</td>
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</tr>
<tr>
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<td>Employee Plus One</td>
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<td>275</td>
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<td>Basic Life</td>
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<td></td>
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<td></td>
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<td>Count</td>
<td>Employee Cost (Monthly)</td>
<td>Employer Cost (Monthly)</td>
<td>Total Monthly Cost</td>
</tr>
<tr>
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<tr>
<td>Sec125 Limited Care</td>
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<td>566</td>
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<td>$-</td>
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<td>Sec125 Limited Care</td>
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<td></td>
<td>16</td>
<td>$-</td>
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<td>Sec125 Health Care</td>
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<td>830</td>
<td>$-</td>
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<tr>
<td>Sec125 Health Care</td>
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<td>$-</td>
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<td>113</td>
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<td><strong>Total</strong></td>
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<td></td>
<td></td>
<td><strong>$202,210</strong></td>
<td><strong>$741,519</strong></td>
<td><strong>$943,728</strong></td>
</tr>
</tbody>
</table>
A08. INCUMBENT BROKER/CONSULTANT

CBIZ Benefits.

A09. DISTRICT TECHNOLOGY SUPPORT SYSTEMS

The District utilizes an online enrollment system for employees for the health insurance products through CBIZ Custom Solutions. The system is integrated with the District’s financial software, also by Weidenhammer.

The District will open an RFP process for the selection of the online enrollment system. This system will be selected after the Broker/Consultant is identified, and is anticipated to be implemented by April, 2019.

A10. EMPLOYEE BENEFIT FUNDING

All plans offered by the District in 2019 are fully insured.

A11. DISTRICT EMPLOYEE WELLNESS

Park Hill School District started an Employee Wellness Program in 2008 and has been providing services each year throughout the year. The District currently does not utilize a financial dis-incentive for employees who chose to not participate in the wellness program. Insurance eligible employees who do not participate in the annual Health Risk Assessment, Annual Health Screening and earn 3000 points will contribute $60 toward monthly health insurance premiums.

In addition, the District provides a wellness and employee assistance program to support staff and families in maintaining physical, social and emotional balance in their lives. By helping employee’s lead healthy, balanced lives, the District supports the people who make the district a success and increase Park Hill’s performance, decrease absenteeism, and manage health costs for employees and the district.

A.11.01 WELLNESS PROGRAMS

Park Hill offers exercise incentives, free health screenings, free flu shots, nutrition programs, access to the district aquatic center, a volleyball league, and counseling services.

A.11.02 FITNESS CENTER

The Park Hill School District Fitness Center opened in 2008. The fitness center offers employees access to treadmills, ellipticals, stationary bikes, recumbent bikes, strength training equipment, aerobics room and locker rooms. The fitness center is located in the lower level of the district office building. A variety of group exercise classes provide ample opportunities for employees, spouses and retirees to stay active. Individual guidance is also provided.
A.11.03 EMPLOYEE DISCOUNTS

By working with district business partners, Park Hill provides employees with discounts at various fitness centers, such as Maple Woods Fitness Center, Gold’s Gym, Curves, YMCA and Gladstone Bowl and other community vendors.

A12. PARK HILL SCHOOL DISTRICT LOGO

The use of the District’s logo may only be used in your presentation and not for any other marketing services or any other uses.
SECTION B | PROPOSAL PROCEDURES

B01. INTENT TO RESPOND

Interested firms are asked to formally notify Park Hill School District with a written intent to respond notice by 5:00PM CDT, Monday, October 15, 2018.

The notice can be provided to the district via email to Jo Ann Blakely, Benefits Coordinator, blakelyj@parkhill.k12.mo.us (verbal notice will not be acceptable).

B01. PROPOSAL QUESTIONS AND CLARIFICATIONS

ALL questions are to be submitted no later than 5:00PM CDT, Friday, October 19, 2018, via e-mail to Jo Ann Blakely – blakelyj@parkhill.k12.mo.us (verbal inquiries will not be accepted).

Responses will be in the form of an e-mail, and will be sent to all firms who have notified the district of an intent to respond. Verbal responses and/or representations shall not be binding on the District.

District will respond to firms with responses to clarification questions no later than 5:00PM CDT, Monday, October 22, 2018.

B02. PROPOSAL MODIFICATIONS AND CANCELATIONS

The District reserves the right to modify or cancel any part of this proposal after issuance in the form of an addendum, which will be e-mailed to each offer or that has notified the District of their intent to provide a proposal for consideration.

All addenda will be posted to the district website. It will be the responsibility of the firm to be informed of any addenda submitted by the district.
B03. PROPOSAL FORMAT

One hard copy and one electronic copy of the proposal is required at the time of submittal. The electronic copy must be in Adobe Acrobat Portable Document Format (PDF) format, and must contain all documents in the same format and order as the hard copy version.

Proposals will not be accepted via fax machine or e-mail.

B04. PROPOSAL DUE DATE AND TIME

Sealed proposals will be accepted no later than 2:00PM CDT, Thursday, October 25, 2018 and all proposals should be clearly labeled as Employee Benefits Broker/Consultant Proposal and be received at

Park Hill School District
7703 NW Barry Road
Kansas City, Missouri  64153

Proposals received after the date and time shall not be considered and will be returned unopened. Proposals will not be opened or reviewed until after the proposal due date and time.

There will be no public opening of proposals. Full disclosure of all proposals will be made available after an award has been made.

B05. CONFIDENTIALITY

Each proposal must be sealed and submitted in or under cover to provide confidentiality of the information prior to the submission date and time. All proposals and supporting documents become public information after the submission date and time, except such information that discloses propriety or financial information submitted in response to qualification statements, all in accordance with the Missouri Open Records Act.

B06. SIGNATURE SHEET

Any proposal submitted MUST include the Signature Sheet found in this RFP which has been signed by an individual authorized to bind the vendor. All proposals submitted without such signature may be deemed non-responsive.

B07. PROPOSALS BINDING

All proposals for service shall remain valid and be binding upon the respondent if accepted by the District within ninety (90) calendar days of the proposal submission date. All proposals shall be signed by an authorized representative of such company.

B08. NEGOTIATION

The District reserves the right to negotiate any and all elements of any proposal direct with the provider. No changes in or to the proposal submissions will be permitted subsequent to the proposed target date unless approved by the District. The District may request clarifications on any portion of the proposal in order to develop a comprehensive assessment of the proposal.
**B09. RIGHTS RESERVED**

The District reserves the right to accept or reject any or all proposals, and to waive any technicalities or irregularities in any proposals, and to make award to the response which in the District’s opinion is the most advantageous to the District. Each proposer agrees that the submission of a proposal constitutes an agreement by the proposing firm to waive any legal claim against the District should the District fail to select their proposal.

**B10. NUMBER OF PLANS**

The employee benefit plans are to continue to include the renewal of the current benefit program. The benefit programs are to be bid for a January 1, 2019 inception.

**B11. CONTRACT PERIOD**

It is the District’s desire to maintain the Benefit Consulting Agreement on a contract year basis (January 1 through December 31), subject to annual approval by the District. This contract period may change for any subsequent period upon formal notification by the District. The District reserves the sole right to renew said contract as deemed in the best interest of the District for up to two (2) more consecutive periods of one year each. The agreed upon contract must include the Scope of Services proposed by the Broker/Consultant.

All contracts must contain a non-discrimination provision.

**B12. TERMINATION**

It shall be the sole right of the District to terminate any contract upon written notification to the Broker/Consultant and to award such commissions the date such change is effective to another Broker/Consultant, if any.

Subject to the provisions below, any contract derived from this Request For Proposal may be terminated by either party upon thirty (30) days advance written notice to the other party; but if any work or service hereunder is in progress, but not completed as of the date of termination, then said contract may be extended upon written approval of the District until said work or services are completed and accepted.

**B12.01 TERMINATION FOR CONVENIENCE**

In the event that the contract is terminated or cancelled upon request and for the convenience of the District, without the required thirty (30) days advance written notice, then the District shall negotiate reasonable termination costs, if applicable.

**B12.02 TERMINATION FOR CAUSE**

Termination by the District for cause, default or negligence on the part of the contractor shall be excluded from the foregoing provision; termination costs, if any, shall not apply. The thirty (30) days advance notice requirement is waived in the event of Termination for Cause.
B12.03 TERMINATION DUE TO UNAVAILABILITY OF FUNDS

When funds are not appropriated or otherwise made available to support continuation of performance in a subsequent fiscal year, the contract shall be cancelled and the contractor shall be reimbursed for the reasonable value of any nonrecurring costs incurred but not amortized in the price of the supplies or services delivered under the contract.

B13. EXPENSES

The District will not be responsible for any expenses incurred by a firm in preparing and submitting a proposal.

B14. GOVERNING LAW

Any accepted firm(s) shall comply with all local, state and federal laws and regulations related to the performance of the program being offered. The proposing firm(s) must be registered with and maintain good standing with the Missouri Department of Insurance, as may be required by law or regulation. All contractual agreements shall be subject to, governed by, and construed according to the laws of the State of Missouri.

B15. TAX EXEMPTION

The District and its Agencies are exempt from State and local sales taxes. Sites of all transactions derived from this proposal shall be deemed to have been accomplished within the State of Missouri.

B16. DISCLAIMER OF LIABILITY

The District, or any of its Agencies, will not hold harmless or indemnify any respondent for any liability whatsoever.

B17. HOLD HARMLESS

The proposing Broker/Consultant shall agree to protect, defend, indemnify, and hold the Board of Education, Park Hill School District, its officers, commissions, employees and agents free and harmless from and against any and all losses, penalties, damages, settlements, costs, charges, professional fees or other expenses or liabilities of every kind and character resulting from the error, omission or negligent act of the contractor, its agents, employees or representatives, in the performance of the contractor's duties under any agreement resulting from award of this proposal.
B18. ASSIGNMENT

Contractors are prohibited from assigning, transferring, conveying, subletting or otherwise disposing of this proposal or any resultant agreement or its rights, title, or interest therein or its power to execute such agreement to any other person, agent, broker, company, insurer or corporation without the previous written approval of the District.

B19. SPECIFICATIONS

Specifications within this RFP have been modified from a prior Request for Proposal by Park Hill School District for Insurance Broker/Consultant Services conducted in Spring, 2012. The 2012 specifications were developed by a third-party consultant, and have been edited with the permission of that consultant for this RFP process.

B20. ANTI-DISCRIMINATION CLAUSE

No respondent of this request shall in any way, directly or indirectly discriminate against any person because of age, race, color, handicap, sex, national origin, or religious creed.

B21. NO CONTACT POLICY

ALL communication through this RFP process is to be with the individuals specifically listed in this RFP. Any contact initiated by any offeror with any district representative not listed (including district staff and Board of Education members) is prohibited. Any such unauthorized contact may cause the disqualification of the offer or from this procurement transaction.

The incumbent Broker/Consultant may maintain their current working relationship with the District on day-to-day issues.

B22. CONFLICT OF INTEREST

The successful Broker/Consultant shall not have conflicts of interest as to any decisions or revenues (other than that fully disclosed herein) from the results of any recommendation made on behalf of the Broker/Consultant. In addition, the Broker/Consultant shall fully disclose any potential conflicts of interest they may have with the District. No salaried officer or employee of the District and no member of the Board of Education shall have a financial interest, direct or indirect, in this proposal for services being solicited. A violation of this provision renders the contract void. The successful Broker/Consultant further covenants that in the performance of this contract no person having such interest shall be employed to work on this project.
23. **INSURANCE**

The successful Broker/Consultant shall be required to maintain and carry in force, for the duration of the contract, insurance coverage of $5,000,000 Broker/Consultant Professional Liability; $1,000,000 Commercial General Liability; $1,000,000 per Accident, bodily injury and property damaged combined single limit Auto Liability for all owned, hired and non-owned vehicles; and Statutory Worker’s Compensation.

The District shall receive a certificate of insurance prior to contract inception that identifies the District as an "additional insured" on the general liability policy. This inclusion shall not make the District a partner or joint venture with the contract respondent in its operations hereunder. Prior to any material change or cancellation, the District will be given thirty (30) days advance notice.

B24. **SELECTION PROCESS**

All proposals will be evaluated by the District's staff and consultants, anticipated to consist of at least the following people or their designees:

- Superintendent of Schools
- Assistant Superintendent - Human Resources
- Assistant Superintendent – Business & Technology Services
- Benefits Coordinator
- Health Enhancement Coordinator
- Insurance Committee Member(s)

B25. **RATING CRITERIA**

A District Evaluation Team will evaluate written proposals based upon the following criteria. The order of the criteria presented below is not to be construed as a ranking of the relative importance of the individual criteria. Prior to the evaluation of proposals and firms, the District Evaluation Team will establish the relative importance of each of the criteria and weight the criteria accordingly.

The district will utilize a Pugh Decision Matrix with this set of criteria as the basis for narrowing the list of firms and to ultimately provide a recommendation of a Firm to the Board of Education for approval.

1. Firm’s Responsiveness to Basic Requirements of RFP
2. Ability to Provide Requirements and Complete Scope of Services
   a. Access to the insurance market on a competitive basis
   b. Ability to help guide the District to be ahead of cost and benefit issues as well as wellness initiatives.
   c. Technical capabilities and resources of the firm as well as with support providers.
   d. Access to insurance-related legal counsel and guidance.
   e. Proactive communication and ongoing guidance on pending health-care reform initiatives and impact on school district.
3. Ability and Successful Experience of Firm Personnel
   a. Successful experience with similarly sized public school districts
4. Quality/Experience of Proposed Project Team
5. Alignment with Park Hill School District Values
   a. Continuous Improvement
   b. High Expectations
   c. Integrity
   d. Visionary Leadership
   e. Student-Focus
   f. Equity

6. Full transparency of fees

7. Cost of Services
   a. Internal Cost of Disruption of Change to Firm (if any)

8. Stability of Firm and Client Recommendations

9. Ancillary Services Provided

10. Overall quality of transition planning from current Firm

A similar set of criteria will be used to interview selected firms.

B26. BASIS FOR AWARD

Information and/or factors gathered during interviews, negotiations, professional news articles and reference checks, in addition to the evaluation criteria contained herein, and any other information or factors deemed relevant by the District, shall be utilized in the final award.

B28. INTERVIEW

The District may decide to conduct an interview of any or all proposing brokers at the District’s discretion. This would be an oral presentation made to the selection committee and will include reference checks.

B29. TIMELINE

The estimated timeline for process is below. Nothing in this RFP precludes the District from requesting additional information at any time during the procurement process.

<table>
<thead>
<tr>
<th>EMPLOYEE BENEFITS BROKER/CONSULTANT- ACTION PLAN</th>
<th>TARGET DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>District formally advertises Request For Proposal per District protocol</td>
<td>Thursday, October 4, 2018</td>
</tr>
<tr>
<td>Firms formally notify Park Hill School District intent to respond</td>
<td>5:00PM CDT, Monday, October 15, 2018</td>
</tr>
<tr>
<td>Firms submit final clarification questions</td>
<td>5:00PM CDT, Friday, October 19, 2018</td>
</tr>
<tr>
<td>EMPLOYEE BENEFITS BROKER/CONSULTANT- ACTION PLAN</td>
<td>TARGET DATE</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>District responds to Firms with responses to clarification questions by no later than this date</td>
<td>5:00PM CDT, Monday, October 22, 2018</td>
</tr>
<tr>
<td>Firms’ Proposals due to Park Hill School District – District Office</td>
<td>2:00PM CDT, Thursday, October 25, 2018</td>
</tr>
<tr>
<td>District Evaluation Team reviews proposals</td>
<td>Thursday, October 25 through Friday, October 26, 2018</td>
</tr>
<tr>
<td>District conducts Firm/Proposal interviews at the Park Hill School District – District Office [Bidder and proposal interviews granted at the sole discretion of the District].</td>
<td>9:00AM – 02:00 PM, Friday, November 2, 2018</td>
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<tr>
<td>Board of Education Meeting – Recommendation to Board of Education for Employee Benefits Broker/Consultant contract</td>
<td>7:00PM CDT, Thursday, November 8, 2018</td>
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<tr>
<td>Employee Benefits Broker/Consultant Agreement begins</td>
<td>Tuesday, January 1, 2019</td>
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SECTION C | PROPOSAL REQUIREMENTS

It is important that your responses be as brief and to the point as possible. Voluminous presentations are NOT encouraged.

Responses provided by the firms will be evaluated by a team of district personnel using an evaluation rubric aligned with the labels below. Firms are strongly encouraged to following the title, format and order of the proposal requirements listed below with each response clearly labeled with the code and corresponding title (i.e. “C01.07 Communication”)

C01. GENERAL SCOPE OF SERVICES

C01.01 HISTORY OF THE FIRM

Via an introduction of the firm, provide a brief history of the firm, including office location that is being proposed to service the District. A Kansas City regional office with significant executive authority is considered extremely important to the District, including being a business partner with the District and community.
C01.02 SCOPE OF SERVICES

Confirm that your services will include, but not necessarily be limited to, the following. To understand the firm’s model of successful delivery of these services, estimate the average number of man-hours per month the firm intends to budget for each service listed over the life of the contract (3-years).

<table>
<thead>
<tr>
<th>Service</th>
<th>Estimated number of man-hours per month to successfully provide this service:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Assist the District in selection and award of contracts for services outlined in The Scope of Current Employee Benefits and Provider Information section. Bidding may occur as often as annually for selected lines of coverage in preparation of the January 1 renewal date. All lines of coverage were bid in advance of the January 2019, renewal.</td>
<td></td>
</tr>
<tr>
<td>2. Prepare a strategic benefits review and report with benchmarking to other comparable school districts and local industry including the State of Missouri. Provide strategic planning and benchmarking on an on-going basis.</td>
<td></td>
</tr>
<tr>
<td>3. Perform an initial review and report of employee health benefits program for cost effectiveness, program design, competitiveness and plan or claims administration. This review/analysis should include premium calculations, drug co-pay rates, etc.</td>
<td></td>
</tr>
<tr>
<td>4. Assist the District in their financial strategic goals through ongoing and regular reporting of fees, commissions, broker compensation, and all other direct, indirect or eligible indirect costs to the District on a regular basis. These include any compensation or non-monetary compensation received from the District, insurance carrier, or plan sponsor in conjunction with an employee benefit plan.</td>
<td></td>
</tr>
<tr>
<td>5. Perform annual reviews and report of programs for renewal purposes. Establish renewal objectives. Request early notification from vendors. Communicate renewal and negotiations.</td>
<td></td>
</tr>
<tr>
<td>6. Provide written reports of findings and recommendations with definitive reasons for recommended changes in terms, conditions or limits.</td>
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<tr>
<td>7. Provide any necessary actuarial services/analysis of health insurance claims reserves, including projecting funding needs (or alternative funding) for upcoming plan years.</td>
<td></td>
</tr>
<tr>
<td>8. Provide liaison services between the District and benefits contractors, including coordination of reporting and assistance resolving claims.</td>
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<tr>
<td>10. Perform special projects as requested by the District, possibly including, but not limited to:</td>
<td></td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>a.</td>
<td>Develop/assist in implementation of new insurance plans.</td>
</tr>
<tr>
<td>b.</td>
<td>Assist in drafting, reviewing, issuing and evaluating requests for proposals (includes identification of appropriate markets).</td>
</tr>
<tr>
<td>c.</td>
<td>Advise the District in contract negotiations/renewals (includes review for accuracy of coverage, compliance, terms and conditions).</td>
</tr>
<tr>
<td>d.</td>
<td>Assist in developing costs associated with various issues involving benefit plans.</td>
</tr>
<tr>
<td>e.</td>
<td>Assist with employee communication projects, which may result from plan changes, legislative or regulatory changes.</td>
</tr>
<tr>
<td>f.</td>
<td>Prepare special reports showing claims experience.</td>
</tr>
<tr>
<td>g.</td>
<td>Prepare/provide benchmarking and survey information used to determine plan competitiveness and strategies.</td>
</tr>
<tr>
<td>h.</td>
<td>Analyze benefits in comparison to employee benefits program objectives.</td>
</tr>
</tbody>
</table>

11. Assist the District with the development of performance guarantees relating to vendors’ performance of services to the District and evaluate the performance of vendors. Coordinate meetings to review performance, etc. Monitor insurance companies for financial solvency.

12. Provide estimates of renewal rates and assist the District in preparation of budget and expenditure projections for benefits. Recommended changes should also include the consultant’s fees to further develop any plan changes and incorporate plan changes into plan documents.

13. Evaluate appropriateness of alternative financing mechanisms such as employee contributions and conventional insurance. Recommend and assist in structuring various retention levels, stop-loss limits, etc.

14. Provide information on health benefits issues, trends, possible new benefits, and proposed or new legislation.

15. Assist the District with on-going maintenance of medical plan documents when necessary due to regulatory changes.

16. Assist the District with other insurance related documents such as COBRA notification.

17. Be available to meet as needed with the District’s staff, administration and the District’s Board of Education and general employees at public meetings. This includes 3 to 5 meetings annually with the District Insurance Committee.

18. Assist in design and delivery of benefits communication material.

19. Be available as needed to answer questions and resolve issues that arise during the year regarding benefits, contract administration and service provisions.
20. Provide updates on all tax law changes affecting benefit plans. Maintain and share knowledge of leading edge products and ideas in benefits arena.

21. Provide assistance with the District’s wellness program.

22. Provide assistance with the District’s onsite medical clinic possibilities.

23. Provide direction with predictive modeling tools, employee benefit statements and benefit calculators.

C01.03 FIRM REPRESENTATION

The firm is to identify one designated customer service representative that will assist either the District or a plan member on a claim dispute or a billing issue. Discuss the District’s ability to make changes should the assigned representative not appear to work out with District personnel.

C01.04 PROACTIVE TRANSPARENCY OF SERVICE COSTS AND COMPENSATION

Within the District’s Comprehensive School Improvement Plan (CSIP) (strategic plan), the District has identified the following financial focus area goal:

*Through the expertise of an engaged staff, the Park Hill School District provides a relevant education in a safe, caring environment to prepare each student for success in life.*

The District has a strategic interest in the firm’s contribution to efficiency and financial transparency through their proactive reporting of fees, commissions, broker compensation, and all other direct, indirect or eligible indirect costs to the District on a regular basis. These include any compensation or non-monetary compensation received from the District, insurance carrier, or plan sponsor in conjunction with an employee benefit plan.

Regardless of the mode(s) of compensation that are ultimately agreed upon, the District desires quarterly invoices outlining the value/cost of the broker/consultant services rendered for that period, credits to these costs (in the form of commissions, fees, etc. if applicable), and any remaining cost to be paid directly by the school district to the firm (if necessary). The firm is asked to provide a sample of a quarterly invoice that would be used.

C01.05 PROGRAM ANALYSIS

Describe the frequency in which you will review current benefits offered regarding plan design, funding and cost compared to the benefits offered to similar employers and retirees in the geographic area. This includes meetings with the Assistant Superintendent of Human Resources, Assistant Superintendent – Business & Technology Services, Benefits Coordinator and possibly the District Insurance Advisory Committee.
Compare benefit program to similar districts.

C01.06 CLAIMS ANALYSIS
Describe the frequency that you anticipate providing claims analysis information to the management of the District. Provide the District with the names of those who will provide the reports if they are different than the insurer. As a broker, please list the types of services you provide in regards to loss evaluation.

C01.07 COMMUNICATION
The District requires assistance with the development and dissemination of employee benefit communication pieces on a quarterly basis and during enrollment. Give an example of one communication piece you authored for a client. Note any employee newsletters, on-line booklets, etc. that would be provided within your quoted fee structure and how such may be distributed to employees of the District.

C01.08 EMPLOYEE SURVEYS
Describe your procedures/processes for an employee survey including what you believe would be the main objective of the survey.

C01.09 LEGISLATIVE UPDATES / REGULATORY & COMPLIANCE SUPPORT
Identify how your firm keeps abreast of current and pending legislative information/updates that may impact either the District or their employees and how you would relay such information to the District. Note any associated cost for ancillary legal issues on benefits that are considered “non-core” services and who provides such services.

C01.10 EMPLOYEE WELLNESS
Describe your firm’s role in the District’s wellness program, including any ancillary services that may be available either with or through your firm (and associated cost that are considered “non-core” services).

C01.11 SUMMARY
In 200 words or less, answer why the District should select your firm as their broker of record by using two very specific objective and unique reasons.

C02. ENROLLMENT SERVICES

C02.01 OPEN ENROLLMENT STAFFING
The District plans on maintaining an annual benefit renewal date of January 1, with Open Enrollment occurring in October-November of each year. With your experience with an account the size of the District (1) describe the firm’s involvement during the annual open enrollment process; (2) outline the number of
employees the firm anticipates providing at enrollment meetings compared to the number of individuals sent by the insurer.

**C02.02 OPEN ENROLLMENT MATERIALS**

The proposing Broker/Consulting firm or insurer will have the capability to provide the District with information (enrollment, changes, plan overviews, etc.) to be placed on the District’s web-based employee portal. Note what is available to be provided and by whom and whether the service is proprietary or may the District continue its use should those services terminate in the future. Outline any fees for the service.

These services should include, but not be limited to:

- Enrollment Portal (note time necessary to receive data from District prior to implementation)
- Data File to be updated daily
- Deduction Data for uploading electronic file to District prior to payroll deduction dates
- Carrier Feeds
- Enrollment worksheets for each employee to complete (sheets separate from online enrollment, including on-line enrollment)
- Premium invoices for all carriers to clients based on system information

**C02.03 PREDICTIVE MODELING**

Describe your capability to run “what if” scenarios regarding possible plan design changes and the impact that would have had on the past claims year or Predictive Modeling for potential claims.

**C02.04 BENEFIT STATEMENTS / BENEFIT CALCULATORS**

Identify any potential on-line benefit statement services or benefit calculators that may be available to the District, either as provided by the proposing Broker/Consultant or as a service that can be purchased by the District. None are currently provided, and this is a general question in nature to see what the proposer may have or ability to provide and if part of the proposed core service charge.

**C03. RENEWAL AND MARKETING**

**C03.01 RENEWAL TIMELINE**
Provide a sample marketing time-line that the Broker/Consultant would typically suggest for the District with a January 1, 2019 inception date. Keep in mind that the District will be enrolling in October - November, 2018.

C03.02 RENEWAL SERVICES

When a decision is made by the District, the broker is to market health, dental, and vision, as well as any other insurance or benefit service program provider, by preparing proposal specifications, identifying insurer/service providers and negotiate with underwriters on the terms and conditions on coverage and price. Confirm that the proposed services and fees included herein include this process, qualitative and quantitative spreadsheet analysis, provider network analysis, pooling point and administrative costs, including your written recommendation.

C03.03 FUNDING ANALYSIS

Confirm that the Broker/Consultant will compare insurance provider discounts, analyze stop-lossquotations, health care provider network matching, first year immature funding issues, reserving practices, fiduciary risk, etc. Comment on whether a partially self-funded or cost-plus product should be considered.

List any client that the firm has assisted in moving to a self-insurance pool based upon the best interest of the client.

C04. FEES/COMMISSIONS

C04.01 COST STRUCTURE

The District requires an all-inclusive cost structure, with the proposing broker’s plan on compensation for insurance placement and benefit consulting that is to be outlined in detail, along with any additional fees, if any for “non-core” services.

The District understands that commissions or other fees can be payable from the insurer to the broker for the broker’s involvement. Specifically identify your proposed commission or fee structure for the programs outlined. The proposing broker is to disclose all anticipated fees, commissions, contingencies, over-rides, bonus, etc., to be paid with regard to or in connection with products sold to or through the District. If any contingencies or over-rides are suspended for 2019, identify if the suspension is anticipated to remain now or in the immediate future. If not suspended for future years, be very clear how this will lower future commissions or cost impact for the District and their employees.
C04.02 FEES TO DISTRICT
Identify typical “pass through” of fees that the District may experience, i.e., mass mailings, pre-approved travel, phone lines, etc. There are currently no “pass through” fees charged the District on current services provided by the broker, other than the on-line enrollment program.

C04.03 BROKER FEES
A Microsoft Excel file named “PHSD Benefit Broker Fees (Firm Name).xlsx” should accompany this RFP document and the proposal from the firm. Completion of this attachment is a mandatory component of any proposal when fees are requested to be disclosed. Failure to submit attachment fully completed as a part of any proposal when requested, will result in the proposal being disqualified for additional consideration. If you need to address any supplemental fees or services, feel free to provide in your response.

Ensure that these fees are consistent with those listed in the sample invoice described in “C01.04 Proactive Transparency of Service Costs And Compensation”

C04.04 UNIQUE SERVICES
Identify any other type of unique service that could be provided to the District, along with the anticipated cost for these services.

C05 EXPERIENCE OF FIRM

C05.01 USE OF SUBCONTRACTORS
If outside firms or individual subcontractors are to be used in lieu of employees, be specific as to their role and how their services are coordinated and who is responsible for their activity and responses.

C05.02 PROFESSIONAL DEVELOPMENT OF STAFF
Note any conferences that pertain to governmental entities and benefit issues that staff assigned to the District have participated in either as a presenter or member.

C05.03 SEMINARS & WORKSHOPS
List any benefit seminars put on by your firm in the past and address whether the District could send a representative.
C05.04 REFERENCES
Provide at least three references for the broker services being proposed, including contact name and phone number. List local governmental entity references that compare to the size and geographic area of the District specifically for similar services that are being proposed on a direct basis.

C05.05 FORMER CLIENTS
Provide at least two prior references for which you no longer serve and reason for termination (do not include clients who left for reasons outside their control, i.e., takeover.)

C05.06 CLIENT FUNDING
Note the estimated percentage of clients that you have fully insured vs. partially self-funded in their group health benefit program. Note any that participate in a self-insurance pool or similar consortium.

C05.07 BALANCE OF BUSINESS
If the District made the decision to appoint your firm as their broker of record, estimate how the District ranks either size (employees) or premium in proportion to the balance of your local business.

C06 INSURER RELATIONS

C06.01 WORKING AGREEMENTS WITH HEALTH CARRIERS
Identify if your firm has current working agreements with the following, along with an estimated annual premium volume placed locally with these health carriers.

<table>
<thead>
<tr>
<th>INSURER/PROVIDER</th>
<th>CURRENT CONTRACT (yes or no)</th>
<th>LOCAL PREMIUM (est.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue Cross and Blue Shield of Kansas City</td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>CIGNA</td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>INSURER/PROVIDER</td>
<td>CURRENT CONTRACT (yes or no)</td>
<td>LOCAL PREMIUM (est.)</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>-----------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>UNITED HEALTHCARE</td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>HUMANA, INC.</td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>AETNA</td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>MIDWEST PUBLIC RISK</td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>MO. CONSOLIDATED</td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>SIPGKC (Self Insurance Pool of Greater Kansas City)</td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>Other:</td>
<td></td>
<td>$</td>
</tr>
</tbody>
</table>

(Note any other health plan providers that in your opinion could be important for the District to know that you have a strong working relationship.)

**C06.02 BLUE CHIP BROKER**

Identify the importance of the distinction as a current “blue chip” broker with Blue Cross / Blue Shield of Kansas City. If you are not a “blue chip” broker, the quoted fees will become an important issue to address on how those fees are paid and by whom they are paid.
FELONY CONVICTION NOTIFICATION

The person or business entity that enters into an agreement with this school district must give advance notice to the District if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony.

The District may terminate this agreement with a person or business entity if the District determines that the person or business entity failed to give notice by the next preceding subsection, or misrepresented the conduct resulting in the conviction. The District will compensate the person or business entity for services performed before the termination of the agreement.

By submitting this offer and signing this certificate, this bidder:

Certifies that the owner/operator has not been convicted of a felony, except as indicated on a separate attachment to this offer, and

Certifies that no employee who will enter school buildings or potentially have contact with school children has been convicted of any felony or a misdemeanor involving violence or sexual contact or sexual abuse. It shall be the duty of the vendor to conduct the appropriate background checks on its employees and vendor agrees to share this information with the District upon request.

Vendor Name: ____________________________________________

Vendor Address: __________________________________________

Vendor E-mail Address: ______________________________________

Vendor Telephone: __________________________________________

Authorized Company Official’s Name: (Printed) ________________

Signature of Company Official: ________________________________

Date: ______________________________________________________
Pursuant to Missouri Revised Statute 285.530, all business entities awarded any contract in excess of five thousand dollars ($5,000) with a Missouri public school district must, as a condition to the award of any such contract, be enrolled and participate in a federal work authorization program with respect to the employees working in connection with the contracted services being provided, or to be provided, to the District (to the extent allowed by E-Verify). In addition, the business entity must affirm the same through sworn affidavit and provision of documentation. In addition, the business entity must sign an affidavit that it does not knowingly employ any person who is an unauthorized alien in connection with the services being provided, or to be provided, to the District.

Accordingly, your company:

a. agrees to have an authorized person execute the attached “Federal Work Authorization Program Affidavit” attached hereto as Exhibit A and deliver the same to the District prior to or contemporaneously with the execution of its contract with the District;
b. affirms it is enrolled in the “E-Verify” (formerly known as “Basic Pilot”) work authorization program of the United States, and are participating in E-Verify with respect to your employees working in connection with the services being provided (to the extent allowed by E-Verify), or to be provided, by your company to the District;
c. affirms that it is not knowingly employing any person who is an unauthorized alien in connection with the services being provided, or to be provided, by your company to the District;
d. affirms you will notify the District if you cease participation in E-Verify, or if there is any action, claim or complaint made against you alleging any violation of Missouri Revised Statute 285.530, or any regulations issued thereto;
e. agrees to provide documentation of your participation in E-Verify to the District prior to or contemporaneously with the execution of its contract with the District (or at any time thereafter upon request by the District), by providing to the District an E-Verify screen print-out (or equivalent documentation) confirming your participation in E-Verify;
f. agrees to comply with any state or federal regulations or rules that may be issued subsequent to this addendum that relate to Missouri Revised Statute 285.530; and
g. agrees that any failure by your company to abide by the requirements a) through f) above will be considered a material breach of your contract with the District.

By: ________________________________ (signature)

Printed Name and Title: ________________________________

For and on behalf of: ________________________________ (company name)
FEDERAL WORK AUTHORIZATION PROGRAM AFFIDAVIT

I, ________________________, being of legal age and having been duly sworn upon my oath, state the following facts are true:

1. I am more than twenty-one years of age; and have first-hand knowledge of the matters set forth herein.
2. I am employed by __________ (hereinafter “Company”) and have authority to issue this affidavit on its behalf.
3. Company is enrolled in and participating in the United States E-Verify (formerly known as “Basic Pilot”) federal work authorization program with respect to Company’s employees working in connection with the services Company is providing to, or will provide to, the District, to the extent allowed by E-Verify.
4. Company does not knowingly employ any person who is an unauthorized alien in connection with the services the Company is providing to, or will provide to, the District.

FURTHER AFFIANT SAYETH NOT.

By:________________________________ (individual signature)

For ________________________ (company name)

Title:__________________________

Subscribed and sworn to before me on this _____ day of ____________________, 20___.

________________________________
NOTARY PUBLIC

My commission expires:
SIGNATURE SHEET

My signature certifies that the proposal as submitted complies with all terms and conditions as set forth in the Park Hill School District RFP for Benefit Broker/Consulting services.

My signature also certifies that the accompanying proposal is not the result of, or affected by, any unlawful act of collusion with another person or company engaged in the same line of business commerce, or any act of fraud.

My signature also certifies that this firm has no business or personal relationships with any other companies or persons that could be considered as a conflict of interest or potential conflict of interest to the Park Hill School District, and that there are no principals, officers, agents, employees, or representatives of this firm that have any business or personal relationships with any other companies or persons that could be considered as a conflict of interest or a potential conflict of interest to the Park Hill School District, pertaining to any and all work or services to be performed as a result of this request and any resulting contract with the Park Hill School District.

I hereby certify that I am authorized to sign as a Representative for the Firm:

Complete Legal Name of Firm: __________________________________________

Address: ____________________________________________________________
                                                                                       ____________________________________________________________

Federal I.D. #: _______________________

Signature: _____________________________________________________________

Name (print/type): ______________________________________________________

Title: __________________________________________________________________

Telephone: (____) _____-_______ Fax: (____) _____-_______

Date: ________________________
Per the requirement listed in C04.03, a Microsoft Excel file named “PHSD Benefit Broker Fees (Firm Name).xlsx” should accompany this RFP document and the proposal from the firm. Completion of this attachment is a mandatory component of any proposal when fees are requested to be disclosed. Failure to submit attachment fully completed as a part of any proposal when requested, will result in the proposal being disqualified for additional consideration. If you need to address any supplemental fees or services, feel free to provide in your response.

The attached document is a blank copy of the required Microsoft Excel file.