

REQUEST FOR QUALIFICATION (RFQ)
SECTION 125 FLEXIBLE BENEFITS PLAN / CONSULTANT
SERVICES

TITLE: RFQ for Gates County School's Flexible Benefit Plan

ISSUE DATE: January 27, 2025

DUE DATE: March 3, 2025

DELIVER TO: Gates County Schools

Attention: Steven Harrell

P.O. Box 125

Gatesville, NC 27938

Sealed proposals must be received by 3:00 p.m. on March 3, 2025. Indicate the firm and/or company name and the primary contact person on the front of each sealed proposal envelope or package. Any proposals received after 3:00 p.m. on March 3, 2025 will not be considered.

Each vendor will need to furnish (5) copies of the proposal.

Gates County Schools intends to review each finalist by March 5, 2025 and make a selection by March 7, 2025.

I. PURPOSE

Gates County Schools is soliciting Request for Qualification (RFQ) for employee benefits broker/consulting services. Currently, we are not requesting specific rates for our benefits. We are in search of a broker/consultant with evidence that they are able to provide the needed benefit administration for Gates County Schools and its employees. It is our intention not to release census data or claims history until after the benefit consultant has been chosen. The broker/consultant must have a proven track record of successfully providing the outlined "Scope of Services" for employers of comparable size and complexity.

This Request for Qualification does not indicate in any way that we are dissatisfied with the services, plans and/or products of our current provider, instead we are ensuring that our employees are continually offered the best benefit services and products available.

II. SCOPE OF SERVICE

Broker selected must be qualified to:

- Assist with annual benefits renewals, including negotiation of changes in contracts.
- Prepare bid specifications, identify appropriate markets, analyze proposals submitted, make recommendations, and assist in negotiation of (preferably multi-year) contracts.
- Annual reviews of selected employee benefit package for quality of benefits provided, cost effectiveness, competitiveness and plan administration.
- Monitor ongoing contracts, including provider plan administration, provider compliance with contract, and incurred claims.
- Provide information on employee benefit issues, trends and proposed or new legislation.
- Be available to meet with the Benefits staff and Management as needed.
- Assist in the design of employee benefits communications. Participate in Benefit Fairs and annual enrollment process.
- Provide a key contact person to be available to answer questions and resolve issues that arise during the year regarding employee benefits, contract administration, and service provisions.
- Prepare benefit booklets each year prior to open enrollment. (provide samples) · Provide online access for employees during open enrollment.
- Perform other related consultation services as needed or requested.

III. TYPE OF PLAN

Gates County Schools desires to have one vendor provide and service all benefits offered to our employees. Proposals should include the following benefits. Verify that your firm has the experience and expertise to “shop the market” for and administer each of the following benefits:

<u>Benefits</u>	<u>Yes / No</u>
Dental Coverage	_____
Vision Care	_____
Section 125 Flexible Benefits Plan Administration (Including Medical and Dependent Care Flexible Spending Accounts)	_____

Group Term Life	_____
Permanent Whole / Universal Life	_____
Short-Term Disability	_____
Cancer	_____
Critical Illness	_____
Accident Plan	_____
Hospital Indemnity – Sickness Plan	_____

How many NC Public Schools do you currently provide with benefits administration services?

Total Number _____

IV. OTHER REQUIREMENTS

Gates County Schools requires interested brokers/consultants to submit a “Qualification Statement”. This statement must be responsive to your firm’s value-added approaches and services that you feel distinguish you from other brokers/consultants and should include supplemental material that further supports the brokers/consultant’s ability to provide the administration of the services outlined in Section II.

Gates County Schools requires a North Carolina licensed agent with the expertise and capacity to provide the products and services requested. Such expertise and capacity must be fully evident within the proposal and verifiable through a minimum of four (4) references. These references must be from NC Public School clients, in which you currently provide Benefit Administration Services. The references should not only be able to verify the company’s ability, but also the agents and/or their agency.

- Gates County Schools reserves the right to reject any and all proposals or parts of a proposal for any lawful reason. All proposals are subject to the final approval and acceptance of the Gates County Board of Education.
- Gates County Schools reserves the right to terminate the contract if the successful bidder violates any term or condition of the contract by giving thirty (30) days written notice stating the reasons therefore and giving the party ample time to remedy the deficiencies.
- Gates County Schools reserves the right to negotiate any and all elements of a contract resulting from this request for proposal.
- All received proposals will be considered final. No additions, deletions, corrections, or adjustments will be accepted after the time of proposal deadline.
- Elaborate proposals in the form of brochures or other presentations beyond that necessary to present a complete and effective proposal are not desired.
- Each proposal shall state that this is a firm offer that may be accepted with a period of 90 days from the date of submission.
- All proposals and correspondence relating to or in reference to this request for proposal shall become the property of Gates County Schools.
- Consistent with North Carolina Public Records Law, any confidential materials shall be marked as confidential when initially submitted. Gates County Schools shall still retain a copy of any confidential information, but shall not disclose any trade secrets or confidential information provided as a part of the RFP.
- Contact of Board Members is prohibited and may subject a bid to disqualification.

V. QUESTIONNAIRE

Please complete and return this questionnaire with your proposal. If needed to answer a question or questions, you may attach a page or pages to this form. Please indicate on the Bid Form that the question is answered on an attached page. Also, please designate any answer on an attached page with the same number as the question on the Bid Form.

1. Name of Firm Submitting Proposal:

2. Names and Titles of Person(s) Submitting Proposal:

3. Address of Firm Submitting Proposal:

4. Phone Number(s) of Firm Submitting Proposal:

5. Contact Person(s) for Firm:

Telephone Number(s) for Contact Person:

6. Please provide four references, preferably from North Carolina public schools, that your firm has worked with.

Client

Contact

a. _____

b. _____

c. _____

d. _____

7. Please feel free to provide other references if you either do not have references that meet the requirements specified in question number 6 or as an opportunity to provide additional references for your firm.

Client

Contact

a. _____

b. _____

c. _____

d. _____

8. Briefly describe your company's organization, philosophy, and management. Also, please provide a brief company history. Identify the account team structure your firm would use to service our account. List the names of the proposed account service team and describe each member's service role.
9. Describe how you propose to build an understanding of the direction and priorities of Gates County Schools and how you would utilize this information in order to anticipate our needs in relation to benefits.
10. Detail how your organization participates in developing a strategic benefit plan with your clients.
11. Describe your organization's involvement in the annual renewal process. Include information regarding process timeframes, negotiation of rates and vendor selection.
12. Describe what resources your firm will provide to keep us in compliance with legislative updates?
13. Describe what types of Wellness services your firm will provide.
14. Describe in detail the communication and enrollment process.
- a. Who will be doing the enrollments?
- b. What is their experience in benefit communication and enrollment with the NC Public Schools?

- c. Include brochures or information you will be using during the enrollment process.
 - d. Do you offer online or web enrollment and if so, please describe?
 - e. Do you have a 365/24/7 platform to manage eligibility? Please describe its capabilities.
15. Please provide a copy of a benefit election form that you have used that can serve as a sample of a benefit election form to be submitted to our employees for benefit enrollment.
16. Describe your annual post-enrollment data return processes.
17. Describe the customer service and support your firm can provide to Gates County Schools administration and our employees. Do you provide a toll-free phone number for our employees for service questions?
- a. Do you provide personalized interactive website?
 - b. Do you provide personalized benefit videos?
 - c. Do you provide comprehensive benefit books?
18. Please provide any professional education opportunities that your firm delivers to staff.
19. Provide any additional information regarding your organization or services that you feel would be beneficial in helping Gates County Schools to select a benefits broker.
20. Please provide a list of all fees that your firm will charge to administer our Employee Benefits and/or other insurance products you will offer.

VI. CERTIFICATION

I certify that I have read this Request for Proposals and have answered all questions on this Bid Form.

I certify that our firm will honor all commitments made on this Bid Form.

I certify that our firm and all representatives are licensed and will be licensed in North Carolina to provide all services offered during the life of this contract.

Signature of Representative

Firm Name

Date of Signature