



**REQUEST FOR QUALIFICATIONS FOR  
EMPLOYEE BENEFIT BROKERAGE CONSULTING SERVICES**

**Barton County, Kansas**

**I. INVITATION**

Barton County is interested in obtaining the services of a professional, highly qualified benefits brokerage and consulting firm to provide a full range of services related to the design, implementation, analysis, maintenance, improvement, and communication of an employee insurance benefits program.

Interested and qualified brokers/consultants who have demonstrated their ability at comparable work are invited to submit qualifications.

RFQs will be accepted until 5:00 P.M. on Monday, August 16, 2021. Submittals and requests for information relative to this Request for Qualifications should be addressed to:

Barton County Clerk's Office  
Attn: Donna Zimmerman, County Clerk  
1400 Main St. Ste 202  
Great Bend, KS 67530  
620-793-1835

[E-Mail: clerk@bartoncounty.org](mailto:clerk@bartoncounty.org)

Written responses and all supporting materials must be submitted via email or through the U.S. Postal Service.

*Please note that Barton County is not asking for, nor authorizing, your soliciting quotes from insurance carriers.*

## **II. BACKGROUND OF BARTON COUNTY**

Barton County is governed by five elected officials forming the Board of County Commissioners (BOCC). The County employs approximately 195 persons full-time and is currently contracted with the Kansas State Employee Health Plan through the end of 2021. The group health, dental and vision plans renew with an effective date of January 1.

## **III. SCOPE OF SERVICES**

The County is seeking to name a Consultant of Record for the County's employee insurance benefits and is looking for continuity of services in the rapidly changing area of employee benefits. The County is particularly interested in a consultant who can offer creative, innovative approaches, with a proven track record, that allows the County to maintain quality programs and contain or reduce costs. The selected consultant will perform a full range of benefit program services related to the acquisition, implementation, maintenance, communication, and improvement of the County's employee insurance benefits. The selected consultant shall provide services, including, but not limited to, the following:

### **A. Analysis and Reporting**

1. Analyze existing coverage and identify or develop cost-saving alternative benefit strategies and plans.
2. Assist in the development of long-range goals and strategies, including making projections of potential savings.
3. Provide analysis and recommendations based on utilization and performance reports, statistical and/or financial reports and plan specific data.
4. Assist the County in monitoring and analyzing experience trends and providing timely alerts on changing patterns and appropriate recommendations.
5. Provide, maintain, and update comparison reports of other city, county entities and private companies' benefit plan offerings and costs to determine their competitiveness with the County's programs.
6. Provide financial and/or performance reviews of our insurance plans.

7. Be available to provide various types of reports as needed, such as cost analysis for benefit changes and other statistical, financial, forecasting, trend, or experience reports.
8. Prepare and present reports on trends, new products and audits as requested.
9. Maintain full and accurate records with respect to all matters and services provided on behalf of the County's benefits plans and programs.
10. Provide County staff or officials all spreadsheets, assumptions, and calculations upon completion of any project performed on behalf of the County's benefit plans and programs.

**B. Liaison and Problem Intervention**

1. Act as liaison between the County and insurance providers.
2. Provide day-to-day consultation on plan interpretation and problem resolution.
3. Provide timely customer service and assistance to staff with issues involving provider billing, claims, vendor service issues/problems, advocacy for services, disputes, interpretation of contracts and services, changes, and general troubleshooting.
4. Attendance as needed at meeting with County staff and/or employees to facilitate and assist in the management of the County's employee benefit plans.
5. Act as an advocate in appeals between the County and the providers on unresolved issues if needed; provide advice when needed to enforce County, employee, or their dependents' rights.
6. Assist the County in proactive mitigation of negative impacts or disruption of services to employees from benefit and/or provider network changes.

**C. Compliance**

1. Assist with ongoing plan administration and ensure that programs are in compliance with State and Federal rules, regulations, and laws.
2. Provide training to County staff, as needed, regarding regulatory updates and/or Best Practice seminars for the effective administration of benefits plan.
3. Review and disseminate information to staff on new or revised State and Federal legislation that impacts benefits programs.
4. Assist County staff with annual audit to ensure compliance with all mandated Federal reporting and posting/notice requirements for benefit plans.
5. Develop and/or assist in developing communication materials and tools for conducting dependent verification audits.

**D. Annual Renewal Process and Evaluation**

1. Review and make cost-saving recommendations regarding the modification of plan design, benefits levels, premiums, communications and quality of current employee and retiree benefit plans.
2. Annual estimates of renewal rates and cost trends and assist County staff in preparation of budget figures.

3. Conduct thorough and applicable market research in preparation for contract renewals.
4. Prepare specifications and compile data, obtain quotes and proposals, negotiate rates, and analyze and compare proposals.
5. Review rate proposals to ensure underlying assumptions are appropriate and accurate to the County. Provide communication development and support for the annual open enrollment period, new benefit offerings and/or changes to the existing benefits offerings.
6. Recommend and help develop enhancement and improvement for benefit communication specific to the needs of the County's employees, including, but not limited to brochures, pamphlets, matrices, comparison charts, summaries, electronic communications, forms, and employee benefit handbooks.
7. As requested, attendance at Board of County Commissioners' (BOCC) meetings to discuss and explain Health, Dental, Vision and Supplemental Insurance offerings.
8. Attendance at, and assistance with, coordination of Open Enrollment meetings and assist with employee enrollment in the County's health, dental, vision and supplemental insurance plans.

**E. Other Service Requirements**

1. Assist in the enhancement of the current employee wellness program to improve employee health and reduce employee healthcare costs.
2. Work collaboratively with County staff.
3. Manage plan transitions as necessary.
4. Develop and/or assist in developing and evaluating employee needs and satisfaction benefit surveys.

**IV. SCHEDULE FOR THE RFQ**

- RFQ distributed ----- 07/30/2021
- Responses to RFQ due ----- 08/16/2021
- Conduct interviews with selected broker/consultants ----- TBD

## **V. CONTRACT LENGTH**

This qualification is for awarding a contract to cover a 2-year period with options to renew under the same terms and conditions. The first year applicable in the agreement will begin on September 1, 2021

The County may, at its option and with the approval of the consultant, extend the period of this agreement up to a maximum of three (3) one-year options, provided the scope of the engagement does not change. The agreement shall automatically renew unless the consultant is notified thirty (30) days prior, in writing by the County Administrator, of the intention to terminate. Termination of the Agreement by the County can occur at any time during the Agreement period and at the County's discretion.

## **VI. RIGHTS OF THE COUNTY**

This RFQ is not in any way to be construed as an agreement, obligation or other contract between the County and any person or firm submitting a proposal, nor does it obligate the County to pay for any costs incurred in preparation and submission of proposals or in anticipation of a contract. Proposals submitted in response to this request become the property of the County and are subject to the provisions of the Kansas Open Records Law after the announcement of award is made. The County may investigate the qualifications of any proposer under consideration, require confirmation of information furnished by the proposer and require additional evidence or qualifications to perform the services described in this RFQ.

Contract award will be made, at the sole discretion of the County, based on the evaluation of all responses, applying all criteria and oral interviews is determined to be the best qualified to perform the scope of services. The County's decision to select a Consultant of Record is final. No right of review or appeal of the decision to appoint a Consultant of Record will be considered. The County reserves the right to:

- A. Obtain clarification of any point in a proposer's response or to obtain additional information necessary to properly evaluate a particular response.
- B. Reject any or all proposals.
- C. Cancel the Request for Qualifications in part or in its entirety without explanation to the proposers.
- D. Issue subsequent Requests for Qualifications.
- E. Remedy technical errors in the Request for Qualifications process.
- F. Approve or disapprove the use of particular subcontractors.
- G. Negotiate with any, all or none of the proposers.
- H. Solicit best and final offers from all or some of the proposers.
- I. Award a contract to one (1) or more proposers.
- J. Accept other than the lowest offer.
- K. Waive informalities and irregularities in proposals.

## **VII. SELECTION PROCESS**

The Contract award will be made after selection of one (1) respondent's qualification from among all respondents with implementation of services to follow. However, this RFQ does not indicate a commitment by the County to award a contract to any successful respondent. An award of contract is estimated to occur within approximately thirty (30) calendar days after receipt of qualifications.

The County intends to evaluate the proposed services based upon the data presented in response to the RFQ. The qualifications will then be reviewed based on qualifications, specific experience, references, familiarity with the services and pricing, and then rated according to which company best meets the County's requirements.

## **VIII. KEY CONSIDERATIONS & EVALUATION CRITERIA**

### **A. Key Considerations**

The RFQ responses will be evaluated based upon the following:

1. Perceived ability of consultant to negotiate a benefits program that meets the needs of Barton County.
2. Consultant's demonstrated expertise in negotiating benefit plans on behalf of clients similar to the County.
3. Consultant's knowledge and/or technical support related to the implementation of an Online Benefits Open Enrollment process.
4. Consultant's and other assigned staff's availability and accessibility, including the location of the office that will be servicing our account.
5. The experience, professional credentials and references of those persons who will actually be servicing our account.
6. Consultant's conceptual approach and ideas related to service, as well as how you will manage our account.
7. Consultant's ability to provide proactive support to the Barton County Human Resources function including dissemination of current general and legal updates as well as time- sensitive insurance carrier information.

## **B. Evaluation Criteria**

In addition to the degree to which the proposer responds to the specifications of this Request for Qualification, the following criteria will be used to, but may not be limited to, evaluate proposals:

### **1. Qualification of the Firm:**

Technical experience in performing work of a closely similar nature; experience working with counties or other public agencies; experience with creative cost containment methods; experience, reputation, and ability to reach a wide array of insurance markets and provide innovative services; record of completing work on schedule; strength and stability of the firm; technical experience and strength and stability of proposed subcontractors; and assessment by client references.

### **2. Staffing and Project Organization:**

Qualifications of project staff, particularly key personnel, especially the project manager; key personnel's level of involvement in performing related work; logic of project organization; evidence of the ability to provide service in a prompt, thorough, innovative, and professional manner; and adequacy of labor commitment.

### **3. Project Requirements:**

Demonstrated understanding of the project requirements and potential problem areas; project approach; work plan; and quality assurance program.

### **4. Cost and Price:**

Reasonableness of the total price and competitiveness of this amount with other offers received; adequacy of data in support of figures quoted; reasonableness of individual task budgets; and basis on which prices are quoted.

## **IX. BROKER/CONSULTANT QUALIFICATIONS**

To assist in the evaluation of potential brokers/consultants, please provide the following information:

- A. Firm name, address, and contact information.
- B. Telephone and Internet address.
- C. Type of firm: individual, partnership, corporation, subsidiary, or government entity.
- D. Organizational structure of the firm, history, including number of years in existence, number and location of offices, total number of employees.
- E. Describe the ability of your firm to provide local service to sites/offices located in Barton County.
- F. Names and titles of all principals/officers of the firm (name, title, phone number).
- G. List applicable certifications and licenses and the associated numbers.

- I. How many years has your firm been providing health, dental, life and vision benefits services to municipalities?
- J. List the public agencies your firm provided similar services for within the past three (3) years. List the number of employees for each agency. Please include the contact person and phone number for each organization.
- K. Discuss your company's resources and activities as they relate to knowledge and understanding of our industry.
- L. Describe the responsibility, experience and qualifications of the individual(s) who would comprise the service team.
- M. Describe the firm's philosophy for servicing an account and commitment to customer service and quality assurance.
- N. Describe your firm's resources or methods to provide education on best practices, trends or hot topics.
- O. Describe the organization's legal research capabilities and how you communicate legislative updates to your clients.
- P. Describe your underwriting resources, procedures, and staff.
- Q. Describe your renewal process and timelines.
- R. What resources does your firm offer to assist with the administration of a benefits program?
- S. Describe your firm's capabilities with regard to communication. Include ongoing employee communication/open enrollment and web-based communications.
- T. What consulting services and/or technical support does your firm have available to the County to facilitate the implementation of an online/automated open enrollment process?
- U. Describe the firm's Errors and Omissions (E&O limits) and provide evidence your company carries all applicable insurance coverages and licenses.
- V. Describe the resources and tools available for benchmarking.
- W. Describe the firm's view of the role wellness programs have on controlling healthcare costs. What resources and tools do you offer clients around wellness initiatives?

**X. GENERAL INFORMATION**

All Requests for Qualifications and related materials become the property of Barton County and may be returned only at its option.

Barton County is not obligated to accept any RFQ or to negotiate with any respondent. All transactions are subject to the final approval of Barton County who reserves the right to reject any or all qualifications without cause or liability. All costs directly or indirectly related to responding to this RFQ (including all costs incurred in supplementary documentation, information, or presentation) will be borne by the respondent.

The selected Insurance Consultant will be required to enter into an agreement with Barton County, following the approval of an agreed upon price.



**XI. FEE INFORMATION**

- A. Describe your method of compensation for your services. Discuss how your method of compensation will be transparent and reported to our team. Does your company accept any carrier “overrides”? If on a commission basis, would your company be taking any form of compensation beyond the commission built into our premium rates? If selected, what are your methods of disclosing compensation to the County and the frequency of that disclosure?