



COUNTY OF BLADEN
REQUEST FOR QUALIFICATIONS
BENEFITS BROKER SERVICES

DUE DATE: NO LATER THAN 2:00pm, JUNE 29, 2023

TYSHELL JONES, HUMAN RESOURCES DIRECTOR
TYSHELLJONES@BLADENCO.ORG
FAX: 910-862-6767

FAXES OR E-MAILS ARE NOT ACCEPTED FOR THIS REQUEST FOR QUALIFICATIONS.

THE BLADEN COUNTY BOARD OF COMMISSIONERS RESERVES THE RIGHT TO REJECT ANY OR ALL PROPOSALS RECEIVED, OR TO SELECT THE PROPOSAL WHICH, IN OUR OPINION, IS IN THE BEST OVERALL INTEREST OF THE COUNTY.

MAIL OR DELIVER RFQ RESPONSE IN A SEALED ENVELOPE IDENTIFIED "RFQ ENCLOSED", YOUR FIRM NAME, AND THE DELIVER-BY DATE ON THE OUTSIDE OF THE ENVELOPE

Deliver to: Tyshell Jones, HR Director
201 East King Street
PO Box 1048
Elizabethtown, NC 28337



Request for Qualifications

TITLE: Benefits Broker Services

DEPARTMENT: Human Resources

ISSUE DATE: June 1, 2023

DUE DATE: 2:00pm on Friday, June 29, 2023

ISSUING AGENCY: County of Bladen
c/o Human Resources
201 East King Street
PO Box 1048
Elizabethtown, NC 28337

Sealed responses to this RFQ subject to the conditions made a part hereof will be accepted until 2:00pm **June 29, 2023** for furnishing services described. **Presentations to an Ad Hoc Committee may be scheduled during the week of July 10-14, 2023.**

IMPORTANT NOTE: Indicate firm name and deliver by date on the front of each sealed response envelope or package identified as RFQ Enclosed. Electronically submitted (email/fax) proposals will not be accepted.

Direct all inquiries concerning this RFQ to: Tyshell Jones tyshelljones@bladenco.org
Human Resources
PO Box 1048
Elizabethtown, NC 28337
Fax: 910 862-6767

NOTE: Questions concerning the RFQ requirements must be submitted in writing BY 4:00pm on June 8, 2023. Questions may be mailed, faxed, or e-mailed (no phone calls) to:

Tyshell Jones tyshelljones@bladenco.org
Human Resources
PO Box 1048
Elizabethtown, NC 28337
Fax: 910 862-6767

Questions must be submitted no later than 4:00 pm June 8, 2023. All questions submitted in writing will be answered in the form of an addendum to this Request for Qualifications. No contact with Bladen County Departments will be allowed during the RFQ process. Any vendors contacting the using department(s) directly may subject their RFQ to rejection.

1. Purpose:

The purpose of this Request for Qualifications (RFQ) is to solicit offers from qualified brokers to assist Bladen County with strategically planning, designing and negotiating the best coverage and cost for selective employee benefit programs, which may include but are not necessarily limited to dental, vision, life insurance, and flexible spending plans. Bladen County has approximately 397 full-time employees. Bladen County is constantly competing to recruit and retain the best employees possible. Our leadership is looking to ensure we have financially competitive and affordable benefit programs to offer our employees.

2. Contract Period:

Any contract resulting from this RFQ shall be effective upon issuance of a notice to proceed and is for the benefits plan year beginning **January 1, 2024, and ending December 31, 2024**, with the option of Bladen County to continue services under the same terms and conditions set forth herein in subsequent years.

3. Scope of Work:

Bladen County requires a North Carolina licensed Broker that is independent and is not affiliated with any insurance company, third party administrative agency, or provider network. The brokerage firm must have experience (no less than 5 years) in providing brokerage services in the public sector arena and the local government unit environment. The County requires the following services:

- Audit resulting contracts for accuracy of coverage, terms, and conditions.
- Assist with annual benefits renewals, including negotiation of changes in contracts.
- When employee benefits are marketed, prepare bid specifications, identify appropriate markets, analyze RFQs submitted, make recommendations, and assist in negotiation of 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 County 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.
- Evaluate various insurance products submitted by carriers, agents and brokers.
- Perform other related consultation services as needed or requested.

4. Vendor Qualification Requirements:

The RFQ response must clearly demonstrate the required qualifications, expertise, competence and capability of the vendor. Please provide a “Qualifications Statement” of your firm’s ability to provide the services required in *Section 3. Scope of Work*. Costs incurred by firms responding to this RFQ are solely their responsibility. Additionally, please include the answers to the following questions (address by number):

1. Describe your organizational structure.
2. Provide documentation that you are a licensed broker in North Carolina. Confirm that you serve as a broker, independently, and are not affiliated with any insurance company, third party administrative agency, or provider network.
3. Briefly describe your company’s organization, philosophy, and management. Also, please provide a brief company history. Describe your contractual relationships, if any, with organizations necessary to your qualification’s implementation (i.e. actuarial services, data information services).
4. How long has your organization been providing brokerage services?
5. How many clients does your organization presently have? Typically, how many clients does each broker manage?
6. How many public sector clients do you manage?
7. Please provide a list of three (3) verifiable client references of similar scope and industry, all of whom are able to comment on your organization’s relevant experience.
8. Please provide a detailed description of your expertise in providing benefits communication and enrollment programs.
9. Respondents shall submit as a part of their Qualification a preliminary implementation plan. The plan should consist of a sequential listing of all steps necessary to provide the requested services and which party is responsible.

10. Please advise the location, telephone number and manager of the company's office which would oversee our account.
11. Describe how the enrollment will be organized and managed. Describe the resources necessary to accomplish benefits enrollment.
12. The individuals performing enrollment must effectively communicate all aspects of the benefits to properly inform and educate employees.
13. Bladen County prefers a provider who can illustrate to employees what benefits and value of benefits are provided. What communication and/or enrollment services make your company's RFQ uniquely attractive in this regard?
14. Describe the customer service and support your firm can provide to Bladen County.
15. Include a sample communication plan and samples of the communication material you will provide for employees.
16. For purposes of collecting enrollment data, the contractor should make available a computer application that is fully developed, tested, and successfully installed. Please describe your enrollment system, including any costs associated with supporting your system.
17. The respondent should provide detail regarding their experience in designing, implementing, administering, managing, and maintaining electronic enrollment services. **How do you maintain data security?** Are fees associated for these services?
18. Describe your annual post-enrollment data return process.
19. Describe your organization's involvement in the annual renewal process. Include information regarding process timeframes, negotiation of rates and vendor selection.
20. Please provide a list of the vendors with whom you have relationships regarding disability, life, supplemental health, vision and dental insurance plans.
21. What is your process for providing plan recommendations to your clients?

5. Criteria for Evaluation:

All RFQs will be evaluated according to, but not necessarily limited to, the following:

- The RFQ's Plan of Services as required in item 3. Scope of Work and 4. Vendor Qualification Requirements.
- Extent and success of previous work provided to organizations similar in nature and size to Bladen County. References provided verifying the required experience and level of service needed by the County.
- The RFQ itself as an example of the potential vendor's work.
- Qualifications/experience of key personnel to be assigned to the project.
- All required forms completed and returned as part of the RFQ package.

6. Oral Presentations:

During the evaluation process, the County may, at its discretion, request any one or all brokerage firms to make oral presentations for the purpose of clarification or to amplify the materials presented in any part of the RFQ. However, brokers are cautioned that the County is not required to request clarification; therefore, all RFQs should be complete. Not all brokers may be asked to make such oral presentations.

7. Final Selection:

It is anticipated that a recommendation will be made to the Board of County Commissioners by August 7, 2023.

8. RFQs Subject to Public Records Laws:

All RFQs, data, materials and documentation originated, prepared and submitted to the County pursuant to this RFQ shall belong exclusively to the County and may become available to the public in accordance with the North Carolina Public Records Act as provided in N.C.G.S. §132-1 et. seq. Bladen County will make reasonable attempts to maintain, in accordance with the Public Records Laws and the Act, the confidentiality of any trade secrets or confidential information that meets the requirements of N.C.G.S. §132-1.2 of the Public Records Laws if such Potential Contractors properly and conspicuously identify the particular data or other materials which are Confidential Information in accordance with the Public Records Laws.

9. Negotiation and Execution of Contract

A Successful Potential Contractor under this RFQ shall negotiate and execute a Contract containing such terms and conditions as shall be satisfactory to the County. The occurrence of negotiations with any Potential Contractor conveys no right or status on such Potential Contractor. By submitting a RFQ, each Potential Contractor acknowledges and agrees that the County may negotiate with one or more Potential Contractors, under such circumstances, at such times and in such a manner as it determines to be in the best interest of the County.

10. Governing Law

This Procurement and any Contract resulting from this RFQ shall be governed by and constructed in accordance with the laws of the State of North Carolina. Any and all claims or disputes arising under or in connection with this RFQ or the Contract shall be exclusively governed by the laws of the State of North Carolina, and venue shall be exclusively within Bladen County, North Carolina.

11. Indemnity and Insurance

Contractors will indemnify and hold harmless the County, its officers, agents, and employees from and against all loss, cost, damages, expense and liability caused by accident or other occurrence resulting in bodily injury, including death and disease to any person, or damage or destruction to property, real or personal, arising directly or indirectly from operations, products, or services rendered or purchased under the contract.

12. Transfer, Assignment, or Subcontract

The covenants and agreements contained within the awarded RFQ are specifically binding and Bladen County will not allow the awarded RFQ to be transferred, assigned or subcontracted to any other party or parties without the express written consent from the County.

13. Equal Opportunity Employer

Bladen County is an equal employment opportunity employer. The County is a federal contractor, and therefore the provisions and affirmative action obligations of 41 CFR §601.4(a), 41 CFR 60-741.5(a), and 41 CFR 60-250.4 are incorporated herein by reference, where applicable.

Note: The right is reserved to accept the response that the Bladen County Board of Commissioners determines to be in the best interest of the County and its employees. The Bladen County Board of Commissioners reserves the right to reject any and or all RFQ responses.

COMPANY NAME: _____

REFERENCES:

Requests for Qualifications must list three (3) references for whom similar work has been performed during the past three (3) years.

1) Client Name: _____

Street Address: _____

City, State, Zip: _____

Contact Name: _____

Telephone/Email: _____

2) Client Name: _____

Street Address: _____

City, State, Zip: _____

Contact Name: _____

Telephone/Email: _____

3) Client Name: _____

Street Address: _____

City, State, Zip: _____

Contact Name: _____

Telephone/Email: _____

THIS PAGE MUST BE COMPLETED AND SUBMITTED AS A PART OF YOUR RFQ.

General Procurement Instructions

1. All requests for qualifications must be received by the county not later the date and time listed on the cover sheet of this RFQ in sealed envelopes or containers. Clearly mark the RFQ number and deliver by date on the outside of the envelope. **Six (6) copies of the RFQ must be received from each offeror (1 original, 5 copies).** Each RFQ must be signed and dated by an official authorized to bind the firm. Late RFQs will not be considered for award. Electronic RFQs (fax, email, etc.) will not be considered. Late RFQs will not be accepted. Postmarks and/or shipping receipts will not be considered as proof of timely submissions. Potential Contractors must provide responses for all items contained that request or call for a response or information, and responses and signatures are required for any attachments to this RFQ that are due with the RFQ. RFQs shall be complete and must convey all of the information requested by Bladen County.
2. RFQs will be evaluated according to completeness, content, experience with similar projects, ability of the broker and its staff. The award of a contract to one broker does not mean that the other RFQs lacked merit, but that, all factors considered, the selected RFQ was deemed to provide the best value to Bladen County.
3. Brokers are cautioned that this is a request for qualifications, not a request to contract and the County reserves the unqualified right to reject any and all offers when such rejection is deemed to be in the best interest of the County. Bladen County retains the right, in its sole discretion, at any time to reject any or all RFQs, in whole or in part, and to cancel or cancel and reissue this RFQ, before or after receipt and opening of RFQs in response thereto, or take any other actions, if it considers it to be in the best interest of the County.
4. Any costs incurred by broker in preparing or submitting offers are the broker's sole responsibility; Bladen County will not reimburse any broker for any costs incurred.
5. RFQs must be submitted in accordance with the requirements of the RFQ. Failure to include any required information may cause rejection of the RFQ.