

Lancaster School District

**Professional Services
Employee Life Insurance Broker
Request for Proposal
RFP BEN-19-01**

Schedule	
ACTIVITY (All times are PST)	DATE
Issue RFP	June 18, 2018
Submittal of Written Questions by 3:00 PM PST	June 22, 2018
Response to Written Questions	June 29, 2018
Proposal Submittal by 3:00 PM PST	July 9, 2018
Oral Interviews with Selected Respondents	Week of July 16, 2018
Award Recommendation to Superintendent	July 23, 2018
Board Approval	August 7, 2018

All dates are subject to change

The Lancaster School District is seeking written proposals for an insurance brokerage firm to provide Employee Benefit Brokerage and Consulting services, regarding Group Term Life Insurance and Voluntary Life Insurance, to the employees of the Lancaster School District beginning with the 2018-19 plan year. Technical questions or requests for clarification shall be directed, in writing, to the e-mail address below. Lancaster School District's responses to a proposer's question(s) will be provided, via return e-mail, only to the proposer asking the question(s), and not shared with the other respondents.

To be considered: A cover letter and five (5) bound and one (1) electronic copy of the proposal must be labeled and received by:

Larry Freise, Ed.D

Assistant Superintendent - Business Services
Lancaster School District
44711 N. Cedar Avenue
Lancaster, CA 93534
Telephone: (661) 948-4661, ext. 100
freisel@lancsd.org

Please forward requests for the current policy and coverage, census data, and claims payment history to ljohns@lancsd.org or gatesd@lancsd.org

This RFP does not commit the Lancaster School District to award any agreement.

BACKGROUND: 15,000 students. The District provides life insurance benefits to approximately 1540 active employees and 349 retirees. The amount of insurance depends on the job type of the employee. District paid life insurance is provided to all regular certificated and management employees regardless of hours worked on the first of the month following their date of hire. For regular classified employees, they are eligible on the first of the month following 60 days of service. The district also offers optional Voluntary Life Insurance with a guaranteed issue and an AD&D component. Our District Office is located at 44711 N. Cedar Avenue, Lancaster, CA 93534.

MINIMUM QUALIFICATIONS

All brokerage firms submitting a proposal must:

- a) Be licensed to do business in the state of California,

- b) Have the expertise, licenses and resources to provide Employee Benefit broker/consulting services for Lancaster School District's current and future operations,
- c) Consistently maintain and allocate sufficient staffing resources to provide timely service for Lancaster School District's Employee Benefit broker/consulting service needs,
- d) Maintain staff that are qualified and available to provide specialized technical expertise in various disciplines as necessary.

REQUESTED INFORMATION:

1. Firm History and Experience

- a) Provide a brief history of your firm including size, volume of business, locations, number of years in business and business philosophy.
- b) Describe the visibility and influence of your firm in the employee benefits field.
- c) Provide a list of carriers that you work with for Group Term Life and Voluntary Life Insurance.

2. Account Team Qualifications

- a) Provide an overview of the account team that would be assigned to the Lancaster School District. For each member of the team, provide highlights outlining qualifications and experience. Provide a summary of roles and distribution of responsibilities.
- b) Describe your approach to the ongoing training of your staff.

3. Clients

- a) Describe at least two innovative strategic solutions you have implemented for clients similar to Lancaster School District that highlight your benefits consulting expertise.
- b) Describe your internal mechanism for ensuring customer satisfaction with your services.
- c) Provide a list of current California School Districts that you work with.
- d) Provide contact names and phone numbers of 3 references.

4. Services

- a) Provide an overview of your account support and administration services, including enrollment coordination and ongoing support for Lancaster School District employees.
- b) Describe your capabilities in ongoing plan performance monitoring, plan performance forecasting, claims experience analysis, benchmarking and reporting.
- c) Describe your capabilities in employee communication.
- d) Describe your consulting and educational services in the area of legal compliance.
- e) Describe your use of technology to support online employee services and education.
- f) Describe any additional service options that may be of interest to Lancaster School District.

5. Describe attributes that make you a valuable strategic partner to Lancaster School District.

6. Compensation

- a) Describe how you expect to be compensated for the services outlined in this proposal.
- b) If compensation is not provided by the district, how do you earn compensation?
- c) Please provide compensation structure.
- d) State your philosophy of compensation disclosure.