

SOLICITATION FOR  
**EMPLOYEE BENEFIT CONSULTING SERVICES**

Issued: April 29, 2020  
Due: May 29, 2020

**Taylorsville-Bennion Improvement District**



**I. BACKGROUND INFORMATION**

Taylorsville-Bennion Improvement District (District) is a political subdivision of the State of Utah organized in April 1957, for the purpose of providing sewer and water services. The District serves a population of approximately 70,000 people.

The District employs 32 people and operates and maintains approximately 229 miles of water lines, 12 wells, and approximately 189 miles of sewer collection lines. The principal place of business and offices of the District are located at 1800 West 4700 South, in Taylorsville, Utah.

District is interested in receiving proposals from qualified health and benefit insurance agencies to provide consulting services concerning group insurance products.

A benefits committee has been formed by the District to make recommendations concerning what insurance products are provided, benefit levels, and selection of insurance providers. The committee has the responsibility to periodically bid group insurance products and review proposals from benefit providers.

The agent/agency will be highly involved in assisting the District's benefits committee in fulfilling these functions.

**II. OBJECTIVE AND SCOPE**

1. Negotiate rates and benefits with insurance providers. Assist the District in the containment of benefit costs.
2. Prepare specifications and assist the District in bidding group insurance products. This includes preparation of RFP's and evaluation of bids.
3. Provide the District's benefits committee with consulting services concerning cost, benefit structure, and contracts with providers for current insurance benefit package.
4. Provide local account management support. For example, billing reconciliation, claims resolutions, organize, and conduct open enrollment meeting, and create annual benefit guides.
5. Provide benefit compliance education.
6. Provide COBRA administration if not otherwise covered by the insurance carrier.
7. Supply educational resources and support tools for employee wellness initiatives.
8. Be the advocate for the District in working with insurers to ensure compliance with insurance contracts and in dispute resolution with benefit providers.

9. Other duties as requested.

### **III. TERMS**

It is anticipated that the District will negotiate and enter into a contract with the successful bidder that will be effective July 1, 2020.

The initial term of the contract will be for five years with the option of renewal for additional one-year terms at the discretion of the District as allowed under law. This contract may be canceled at any time within 30 days written notice from either the District or the agent/agency.

Cost proposals should include not only cost, but how compensation will be calculated and whether it will be a flat fee or a percentage. Cost summary should also outline any additional expenses that may be incurred (e.g. Online System Support, COBRA, etc.).

### **IV. PROPOSAL FORMAT**

Concise format – 20 pages or less, plus addendums.

The proposal should follow the format listed below.

- I. Cover Letter
- II. Firm Information and Experience
- III. Primary Contact(s) Information and Resumes
- IV. Understanding of the District & Recommendations
- V. Cost Proposal
- VI. References

### **V. PROPOSAL CONTENT**

An explanation of the agent/agency's experience in providing insurance consulting services for companies and governmental entities.

A list of reference clients for which the firm has provided consulting services. For each client please list the services provided and insurance companies utilized.

Include resumes of individuals who would be assigned to work with the District if your firm is selected as our insurance agent/agency. Describe the role that each individual would fulfill.

Outline unique services that qualify your firm to serve the District.

Describe your experience with the benefit providers currently utilized by the District. Please make suggestions concerning modifications you would recommend to current benefits.

**VI. DIRECTIONS FOR SUBMITTAL**

Three (3) copies of your proposal must be submitted to Bruce Hicken, Director of Finance, Taylorsville-Bennion Improvement District no later than 4:00 PM, Friday, May 29, 2020.

Proposals may be submitted in one of the following ways:

- Hand-delivered to 1800 West 4700 South, Taylorsville, Utah
- Mailed to PO Box 18579, Taylorsville, UT 84118
- Emailed to [bruce@tbid.org](mailto:bruce@tbid.org)

Late Submission: Bids received after May 29, 2020 at 4:00 p.m. (MDT) will not be considered. Any mailed bid received after that date and time will not be considered, irrespective of the date of mailing or any other factor.

**VII. SELECTION PROCESS**

1. The District's benefits committee will review the proposals using the evaluation criteria listed below.
2. At the discretion of the District's benefits committee, two firms may be asked to provide a presentation to the District's benefits committee.
3. Final selection will be based on the District benefits committee's assessment of the written proposal and possible presentation.

The District reserves the right to reject any or all proposals and to waive any formality or technicality in any proposal.

**IX. EVALUATION CRITERIA**

1. Ability of firm to meet the scope of services and general services offered - 25%.
2. Expertise and experience of primary contact(s) and ability to negotiate rates and benefits to maximize value to District - 25%.
3. Cost Proposal – 25%.
4. Understanding of the District's products and suggestions for future considerations - 15%.
5. References - 10%.

(Scoring totals 100%)

Each category, except for Cost, will be scored by the evaluation committee on a scale of 1-10, where 1 indicates that the proposal fails to address some or all of the requirements described in

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the solicitation or fails to demonstrate that the offeror can perform the scope of work, and 10 indicates that the proposal addresses and exceeds all of the requirements or criteria described in the solicitation. The category will then be given a corresponding percentage point. For instance, if a category is worth 25% of the overall score, a score of 10 will receive all 25 available points for that category. A score of 9 will receive 90% (9/10, in other words) of the available percentage points for that category, which, in this example, equals 22.5 points, and so on.

The cost proposal will be reviewed separately by an individual not part of the evaluation committee using a scale of 0-25, and the cost score will be added-in after the scoring of the proposal is complete. The offeror with the lowest proposed price will receive 100% of the pricing points (25 points). All other Proposers will receive a portion of the total pricing points based the lowest price divided by the Proposer’s price multiplied by the total possible points. Points will be rounded to the nearest whole number.

- L - Lowest Price
- P - Proposer Price
- T - Total Possible Points for Pricing (25)

$$\text{Cost Score} = L/P * T$$

**X. Current Benefit Summary**

Insurance Type	Carrier	Plan	Deductible	Max Out of Pocket / Annual Benefit Max	Plan Design	Employee Contribution
Health	PEHP	Summit or Advantage	\$250 per individual, \$500 per family	\$3,000 per individual, \$6,000 per family	Traditional Option 1, No HSA	\$0.00
Dental	PEHP	Preferred or Traditional	\$0 Preferred, \$25 Traditional	\$1,500		\$0.00
Life	PEHP	Basic & Optional			\$50,000 EE, \$10,000 Spouse	\$0.00
Accidental Death & Dismemberment	PEHP				\$50,000 EE	\$0.00
Flex Spending	PEHP				Healthcare & Dependent Day Care	
LT Disability	The Standard				Benefit Waiting Period - 90 Days; 66.7% of First \$10,000 of Earnings; Maximum Monthly Benefit - \$7,000	\$0.00

**XI. SOURCES OF INFORMATION**

All correspondence and inquiries concerning this solicitation should be directed to:  
Bruce Hicken  
Taylorsville-Bennion Improvement District  
Director of Finance  
1800 West 4700 South  
Taylorsville, UT 84129

**XII. PROPRIETARY INFORMATION**

Offerors are required to mark any specific information contained in their proposal, which is not to be disclosed to the public, or used for the purposes other than the evaluation of the proposals. Pricing and service elements of the successful proposal will not be considered proprietary. All materials become the property of the District and may be returned at the District's option. Proposals submitted may be reviewed and evaluated by any person at the discretion of the District.

**XIII. PROCUREMENT**

All proposals in response to this Solicitation will be evaluated in a manner consistent with the Utah Procurement Code and the District's Purchasing Policy. The District reserves the right to reject any or all submittals, or to waive any formality or technicality in any submittal, in the best interests of the District. This Solicitations falls within the District's small purchase policy. As such, the District will make its selection based on the proposal criteria listed above, including cost, but the District is not obliged to select the service provider presenting the lowest cost quotation.