Request For Proposals
Benefit Administration Services
Lakeview Public Schools
Proposals Due by

Invitation
Lakeview Public Schools Board of Education is seeking a vendor to provide a full suite of benefit administration services. The term of this proposal is a minimum of two years, commencing July 1, 2018.

The District is looking for a strong partnership with a vendor that can provide a full suite of benefit administration services. In addition, the District is interested in understanding your ability to offer full HRIS capabilities. The District employs approximately 500 active employees including 293 benefit eligible employees. We have five collective bargaining groups that represent the majority of staff and some staff that are not part of a collective bargaining agreement.

The District will expect a high-touch, high-service vendor partner. This proposal will be evaluated based on both proposal price and perceived service quality under our rating categories. Service rating categories include, but are not limited to: 1) Company History/Stability, 2) Company Practices, 3) Industry Experience and Expertise, 4) Additional Services Available, 5) Security, Privacy and HIPAA Compliance Policies and Practices.

Interested and qualified vendors are invited to submit proposals which will be accepted until April 6th, 1:00 p.m. Proposals should be sent to our benefit consulting partner, Gallagher Benefit Services, attention Sara Konieczka, sara_konieczka@ajg.

Timeline

<table>
<thead>
<tr>
<th>RFP Timeline / Schedule Activity</th>
<th>Date</th>
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<tbody>
<tr>
<td>RFP Distribution</td>
<td>March 26, 2018</td>
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<tr>
<td>RFP Responses Due</td>
<td>April 6, 2018</td>
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<tr>
<td>Proposal Review and potential vendor interviews</td>
<td>April 9 – 13, 2018</td>
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<tr>
<td>Select Vendor (Board Meeting)</td>
<td>May 15, 2018</td>
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<td>Relationship Effective Date</td>
<td>June 1, 2018</td>
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Scope of Services

1. Briefly describe your firm’s history and background, including details of your firm’s financial status and stability and any impending changes in your organization that could impact the delivery of services.
2. Provide proof that your company carries Errors and Omissions insurance coverage.
3. Provide proof that your company carries Cyber coverage.
4. What size clients does your firm generally support? Describe your experience with governmental clients such as schools or other local governments.
5. Provide a listing and pricing for all of your services. Please note, it will be at the discretion of the district to choose which services they would like to implement. If available, please provide your pricing al carte as well as bundled. Services should include:
   a. A benefit administration platform that supports open enrollment, ongoing for new hires, terms and life events
   b. Enrollment decision support tools
   c. EDI files – District currently utilizes 5 carriers for benefits. The carriers are as follows:
      i. BCBSM (medical and dental)
      ii. Magellan RX
      iii. Varipro (vision)
      iv. Hartford (life/DI)
      v. TASC (FSA and COBRA)
   d. ACA hours tracking and IRS reporting capabilities
   e. Bill reconciliation services – if available
   f. Call center - if available
   g. Other HR system functions such as Core HRIS, timekeeping, performance management, and others.
6. Two-year pricing is preferred, please confirm if this is available.
7. Please confirm if your system will require an employee to use their SSN (or any part – ex: last four digits) as part of their initial login and/or password. Vendors that require this may not be considered.
8. Explain your capabilities to provide real time reporting for determining payroll deductions for employees based on elections made within the software.
9. Describe the options and avenues for employer customer service. Will Lakeview be assigned a dedicated account manager? Will this be the same person as the implementation manager?
10. How much lead time does Lakeview need to provide for 1/1/19 plan changes?
11. Describe the options and avenues for employee customer service (both technical and benefit related questions). Where is the call center based?
12. Explain how you support FSA elections and deduction reporting.
13. Describe your capabilities to educate employees to make enrollment decisions (e.g., text, videos, examples, scenarios, etc.).
14. If employees have different payroll frequencies. Can you accommodate?
15. Describe how your system can support hours tracking and IRS reporting for the ACA requirements.
16. Explain what happens when an employee meets their waiting period for coverage or becomes benefit eligible.
17. Is your system able to be accessed via mobile devices or mobile apps? If yes, please provide details.
18. Explain your security, privacy and HIPAA compliance policies and practices.

19. Provide a timeline for implementation. Please keep in mind that the system needs to be open and fully functional for a July 2019 go live date. Open enrollment will occur in November with a 1/1/19 effective date.

20. Please provide three references, preferably in Michigan and groups similar in nature if possible. For each reference please include:
   a. Number of employees
   b. Number/type of plans
   c. Length of servicing relationship
   d. Contact name, title, email and phone number

21. Provide any additional information you feel will assist in evaluating your proposal.

If you require additional information regarding any aspect of this RFP please contact Sara Konieczka, sara_konieczka@ajg.com.

Much effort has been made to provide all necessary and accurate information. It is the sole responsibility of the proposers to ensure that they have all information necessary to complete submission of their proposals.
Please complete the pricing chart below:

<table>
<thead>
<tr>
<th>Service Description</th>
<th>Provide Pricing on Bundled Basis</th>
<th>Provide Pricing on Unbundled Basis</th>
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<tbody>
<tr>
<td>Implementation Fee</td>
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<tr>
<td>Ben Admin Platform to support open enrollment, ongoing new hires, terms and life events</td>
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<td>Enrollment decision support tools</td>
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<td>Other: (Please itemize any other charges or fees not noted above)</td>
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