



REQUEST FOR PROPOSAL:

**HEALTH AND WELLNESS
CONSULTING SERVICES**

October 9, 2013

RFP release date:	October 9, 2013
Contact name: Address: Phone: Fax: E-mail address:	Meg Jette Santa Barbara Unified School District 720 Santa Barbara Street Santa Barbara, CA 93101 805-963-4338 Ext. 6230 805-963-5685
Deadline for questions and objections:	November 1, 2013
RFP due date: Time: Location: Number of Copies:	November 15, 2013 5:00 PM Pacific Standard Time Santa Barbara Unified School District 720 Santa Barbara Street Santa Barbara, CA 93101 Attn: Conrad Tedeschi Six hard copies of the vendor's proposal must be sent to the address above.

1 INTRODUCTION

The Santa Barbara Unified School District (District) is currently soliciting qualified firms to submit proposals to perform health and wellness consulting services. It is the intent of the District to sign a two year contract with three (3) one-year options to renew at the District's discretion.

2 **BACKGROUND**

Santa Barbara Unified District (the “District”) is located in Santa Barbara County (the “County”) and is governed by a five-member Board of Education (the “Board”). The territory of the District encompasses approximately 136.4 square miles, and includes the cities of Santa Barbara and Goleta, the community of Montecito and certain unincorporated areas of the County. The District currently operates eight elementary schools, three charter schools, one alternative elementary school, one community academy, 15 children’s centers and after school child care centers, four junior high schools (grades 7-8), one alternative high school (grades 9-12), one continuation high schools (grades 9-12) and three high schools (grades 9-12).

The District currently employs approximately 703 full-time equivalent (“FTE”) certificated employees and 583 FTE classified employees. In addition, the District employs 525 part-time faculty and staff. District employees, except management and some part-time employees, are represented by two bargaining units as noted below:

<u>Labor Organization</u>	<u>Number of Employees In Bargaining Unit</u>	<u>Contract Expiration Date</u>
Santa Barbara Teachers Association	764	June 30, 2014
California School Employees Association	720	June 30, 2014

The District currently offers the following health and welfare benefits through Self-Insured Schools of California (SIS) for the 2013-14 school year:

Medical:

- Three PPO plans and one HMO plan through Anthem Blue Cross
- One HMO plan through Kaiser Permanente

Dental:

- Delta Dental PPO Premier Incentive – SISC

Vision:

- VSP-SISC - Vision Service Plan

Life/Accidental Death and Dismemberment/Dependent Life:

- Cigna

3 DESIRED QUALIFICATIONS

The ideal consulting firm must have extensive consulting experience in the employee benefits, health and wellness industry and have practical experience with higher education / school district / public sector clients for the requested services. A detailed knowledge and understanding of the Affordable Health Care Act is also very critical.

4 TERM OF AGREEMENT

It is anticipated that the term of this agreement will be effective through December 31, 2016, assuming a contract start date of January 1, 2014. It is the intent of the District to sign a three year contract with 2 one-year options to renew at the District's discretion.

5 COMPENSATION

The proposal should include a not to exceed estimate for the entire scope of work as indicated on Attachment A – Cost Proposal. Your cost proposal must be inclusive of all local travel. Should the District request the consultant to travel beyond southern California (e.g., a national conference), the District and Consultant will mutually agree on expenses to be incurred by the District.

6 OBJECTIONS

Any objections as to the structure, content or distribution of this RFP must be submitted in writing to the Contact listed on the cover sheet of this document. Objections must be as specific as possible, and identify the RFP section number and title, as well as a description and rationale for the objection.

All objections, questions and inquiries must be received by the deadline stated on the cover sheet.

7 PROPOSAL SUBMITTAL REQUIREMENTS

You must respond to this RFP by the due date and time as stated on the cover sheet of this document in order for your proposal to be considered. Proposals must be submitted and addressed to the attention of the contact listed on the cover sheet of this document, clearly labeled "RFP - Health and Wellness Consulting"

SCOPE OF CONSULTING SERVICES

a. Plan Design and Implementation

Provide consulting services to the District to implement a self-funded health and wellness plan in line with the Affordable Health Care Act requirements.

b. Basic Ongoing Services for Health and Wellness Consulting

1. Plan Review: Quarterly
2. On-site meetings and presentations with Employer Health Benefits and other senior management staff: As needed as determined by consultant or district staff.
3. Produce comprehensive reports, including cost trend components and their impact as well as areas of opportunity in controlling costs: Quarterly in the first two years of the agreement then semi-annually after that.
4. Benchmark other plan offerings against current plan costs and offerings: Semi-Annually and as requested.
5. Incorporate healthcare reform elements into health care strategy: As Needed

b. Financial Management

1. Prepare financial experience reports and plan year projections for budgetary purposes: Semi-Annually
2. Provide relevant PPACA financial forecasts: Annually
3. Plan Design evaluation and benchmarking trends and state of the marketplace nationally and California based, including comparison of California public sector: Annually

c. Health and Wellness Planning and Execution

1. Assist the District in creating and executing a comprehensive health and wellness plan for employees.
2. Lead efforts to implement and manage the health and wellness plan for employees.
3. Consult regarding health and wellness plan options for retirees.

- d. Perform any Request for Proposal Services that may be requested in the future.
 - 1. Assist District staff with designing specifications for the RFP.
 - 2. Review responses and provide a summary report to the District.
- e. Project Services that may be requested in the future

Develop plan design alternatives and recommendations as appropriate for future health care trends and/or regulatory changes for both active and retired employee populations.

PROPOSAL RESPONSE MUST INCLUDE:

- 1. Please describe why your organization is best qualified to perform the service. What differentiates your organization from your competitors, technically and specifically?
- 2. Please provide a detailed statement of work describing the health and wellness consulting services you propose to provide to the District as per the expressed needs in the Statement of Work. Describe any innovative methods you have developed to increase effectiveness of your consulting solutions. Please include any other relevant information that supports your proposal.
- 3. Please describe your firm's capabilities with designing, managing and procuring contracts and services that include various funding arrangements. Please specifically detail and provide examples of your approach to working with fully insured, alternative funding and self-funded arrangements.
- 4. Please provide a brief history of your organization. Include key services your organization currently offers and years of experience for each service.
- 5. Please provide an organizational chart of services to be provided and all key personnel with your proposal. Include bios for key staff and include any pertinent designations. The Certified Employee Benefit Specialist designation is highly preferred.

6. Please provide an example of a client that has used your services and any cost savings that was achieved and how the savings were attained.
7. Please provide three client references and include contact names and phone numbers. Ideally, at least one of these references will be for an education or public entity client. Include a brief description of the services you are providing for them. Please note that we will be contacting these references. Please use Attachment C – Customer Reference for this purpose
8. Describe the proposed location for your operation under this proposal. If your operation will not be located in Santa Barbara, please describe how you will accommodate the service needs of the District.
9. Please provide an example of an open enrollment document that your company has developed for a past client, preferably for a California school district or county office.
10. Please provide an overview of consultant and district responsibilities during the implementation period as well s ongoing in maintaining a self-insured plan for the district.

REFERENCES

At the time of proposal submission, three references are required from Proposers that can substantiate where the Proposer has provided products, service and support similar to the requirements of Attachment A, Scope of Work and Requirements. One of these references should be from a California school district or county office. Please submit these references using the form in Attachment C: Customer Reference Worksheet

FEE STRUCTURE

Compensation will vary depending upon vendor response to this RFP. The District reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request. See Attachment A - Cost Proposal for more pricing details.

ATTACHMENTS

Attachment A – Cost Proposal

Attachment B –Terms and Conditions. Selected consultant will be required to enter into an agreement with the District containing the terms and conditions and insurance provisions set forth in Attachment B. If you have any exceptions to the standard terms and conditions you must note them in your proposal. If there are no exceptions, submit the first page of each Attachment stating “No Exceptions”.

Attachment C - Customer Reference Worksheet

Attachment D – Conflict of Interest Form

Attachment E – Insurance Requirements

8 SELECTION PROCESS AND EVALUATION CRITERIA

SELECTION PROCESS

District staff will evaluate proposal submissions. The District reserves the right to interview prospective firms/individuals prior to making its selection. The District also reserves the right to rely on information from sources other than the information provided by the respondents.

Responses will be evaluated as outlined in this section.

The District reserves the right to accept an offer in full, or in part, or to reject all offers.

EVALUATION CRITERIA

Description	Weight
Proposal Responsiveness	Pass/Fail
Review of Management Proposal	35%
Customer Reference / Firm Reputation	35%
Fee Structure (Cost)	30%

10 CONFLICT OF INTEREST

In order to avoid a conflict of interest or the perception of a conflict of interest, Proposer(s) selected to provide services under this RFP will be required to complete Attachment D – Conflict of Interest Form

The Proposer(s) selected under this RFP will be precluded from submitting proposals or bids as a prime contractor or subcontractor for any future procurement with the District if the specifications for such procurements were developed or influenced by the work performed under the agreement(s) resulting from this RFP.

Proposer(s) may not have any interest in any potential Proposer for future District procurements that may result from the work performed under the agreement resulting from this RFP.

In order to determine whether such interest may exist, all Proposers must complete the attached Conflict of Interest Form (Attachment D).

11 GENERAL INFORMATION

The successful Proposer will be required to demonstrate evidence of insurance in accordance with the insurance provisions listed in Attachment E – Insurance Requirements.

All costs associated with responding to this request are to be borne by the Proposer.

It is the District's policy that the selected firm shall not discriminate, in any way, against any person on the basis of race, sex, color, age, religion, sexual orientation, actual or perceived gender identity, disability, ethnicity, or national origin, in connection with or related to the performance of District contracts.

12 PUBLIC NATURE OF PROPOSAL MATERIAL

All correspondence with the District including responses to this RFP will become the exclusive property of the District and will become public records under the California Public Records Act all documents that you send to the District will be subject to disclosure if requested by a member of the public. There are a very limited number of narrow exceptions to this disclosure requirement.

Therefore, any proposal which contains language purporting to render all or significant portions of their proposal "Confidential", "Trade Secret" or "Proprietary", or fails to provide the exemption information required as described below will be considered a public record in its entirety.

Do not mark your entire proposal as “confidential”.

The District will not disclose any part of any proposal before it announces a recommendation for award, on the ground that there is a substantial public interest in not disclosing proposals during the evaluation process. After the announcement of a recommended award, all proposals received in response to this RFP will be subject to public disclosure. If you believe that there are portion(s) of your proposal which are exempt from disclosure under the Public Records Act, you must mark it as such and state the specific provision in the Public Records Act which provides the exemption as well as the factual basis for claiming the exemption. For example, if you submit trade secret information, you must plainly mark the information as “Trade Secret” and refer to the appropriate section of the Public records Act which provides the exemption as well as the factual basis for claiming the exemption.

Although the California Public Records Act recognizes that certain confidential trade secret information may be protected from disclosure, the District may not be in a position to establish that the information that a Proposer submits is a trade secret. If a request is made for information marked “Confidential”, “Trade Secret” or “Proprietary”, the District will provide Proposers who submitted the information with reasonable notice to seek protection from disclosure by a court of competent jurisdiction.

13 PROTESTS

If an unsuccessful Proposer wants to dispute the award recommendation, the Protest must be submitted in writing to the Director of Finance or designee no later than ten calendar days after announcement of the successful Proposer, detailing the grounds, factual basis and providing all supporting information. Protests will not be considered for disputes of proposal requirements and specifications, which must be addressed in accordance with the above Section. Failure to submit a timely written Protest to the contact listed below will bar consideration of the Protest.

The address for submitting protests is:

Santa Barbara Unified School District
720 Santa Barbara Street
Santa Barbara, CA 93101
Attn: Conrad Tedeschi, Director of Fiscal Services