

12/22/2022 (Extended on 01/18/2023) (Extended on 3/1/2023)

REQUEST FOR PROPOSAL: EMPLOYEE BENEFIT BROKER/CONSULTING SERVICES

Dear Perspective Employee Benefits Broker:

Outpatient Medical Center (OMC) is seeking written proposals for an insurance brokerage firm to provide Employee Benefit Brokerage and Consulting services related to OMC. Technical questions or requests for clarification shall be directed, in writing, to the email address below. OMC's responses to a proposer's question(s) will be provided via return email only to the proposer asking the question(s), and not shared with other respondents.

Attention: OMC Procurement Officer
Outpatient Medical Center Executive Suite
1640 Breazeale Springs Street
Natchitoches LA 71457
318-357-2071
Info@outpatientmedical.org

1. GENERAL INFORMATION

1.1. Key Dates

The following table outlines OMC's key dates and events in this RFP process.

12/22/2022	RFP is available
03/16/2023	Questions and Answer Period
03/17/2023	Deadline for receipt of Proposals to OMC's office
04/14/2023	Oral Interviews with selected respondents
05/05/2023	Selection completed/contract negotiations begin

OMC reserves the right to extend the submission deadline or any other deadline or date indicated in the RFP in the event that an extension would be in the best interest of OMC.

1.2. Background of Company

OMC is a non-profit 501c3 organization with federal tax exemption. OMC is a federally qualified health center that provides healthcare services to primarily the underserved in Natchitoches, Leesville, and Tallulah areas of Louisiana. At the time of this RFP, OMC has approximately 47 full-time employees for whom benefits are made available.

1.3. Preparation Costs

OMC shall not be responsible for proposal preparation costs, nor for the cost, including attorney fees associated with any administrative, judicial or other type of challenge to the determination of the selected proposer and/or award of the contract and/or rejection of the proposal. By submitting a proposal, each respondent agrees to be bound in the respect and waives all claims to such costs and fees.

2. RULES GOVERNING PROPOSALS

2.1. Confidentiality

The content of all proposals will be kept confidential throughout the selection process and afterward. Copies of any proposal will not be shared with other respondents.

2.2. Disposition of Proposals

All materials submitted in response to the RFP shall become the property of OMC.

2.3. Modification of Proposals

Modifications to proposals will not be accepted by OMC.

2.4. Late Submissions

Proposals not received prior to the date and time specified will not be considered and will be returned to the proposer unopened.

2.5. Acceptance/Rejection of Submittal

OMC reserves the right to reject any or all responses to this RFP, to waive minor irregularities in any proposal or in the RFP procedures, and to accept any proposal presented which meets or exceeds these specifications and which is deemed to be in the best interests of the OMC. However, the requirements for timelines shall not be waived.

2.6. Proposal Evaluation

The Executive Officers of OMC will perform the evaluation of all proposals. Following this evaluation process, OMC may invite respondents to complete an oral interview. The purpose of the interview is to allow those further selected firms expansion and discussion of their written responses.

2.7. Oral Interviews

Oral interviews are provided at the sole discretion of OMC and are for the purposes of allowing OMC to broaden their understanding of certain selected respondents.

2.8. Final Broker Selection

The final selection of the successful respondent(s) is scheduled to be completed by **05/05/2023**. The successful respondent will assume their responsibilities on **08/01/2023**.

3. MINIMUM QUALIFICATIONS

All brokerage firms submitting a proposal must:

- a. be licensed to do business in Louisiana and other applicable states,
- b. have the expertise, licenses and resources to provide Employee Benefit broker/consulting services for OMC's current and future operations,
- c. consistently maintain and allocate sufficient staffing resources to provide timely service for OMC's Employee Benefit broker/consulting services needs,
- d. maintain staff that are qualified and available to provide specialized technical expertise in various disciplines as necessary.

Proposers may not contact the insurance marketplace nor discuss our account with underwriters until we have made our final broker selection.

4. PROPOSAL GUIDELINES

Please respond as outlined in this request for proposal and observe the following guidelines:

- a. Respond to questions as directly as possible along with any supporting information you feel will be pertinent to these questions.
- b. Submit (1) Written proposal to our office no later than **4:00pm 03/17/2023** – OR – Electronic proposal must be emailed to info@outpatientmedical.org no later than **4:00pm 03/17/2023**
- c. Our final broker selection will be made based on our evaluation of the criteria outlined in Section 6 of this Request for Proposal.

Submission of a proposal will be construed to imply agreement in advance to the services outlined in the enclosed materials. Brochures, photos, annual reports or any other appropriate printed material may be included in your proposal. The proposal package should be kept as brief as possible, however, with the subject areas clearly defined.

5. QUESTIONS

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.

2. Account Team Qualifications

- a) Provide an overview of the account team that would be assigned to OMC. 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 your internal mechanism for ensuring customer satisfaction with your services.
- b) 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 the level of ongoing support you would provide to OMC management and employees.
- b) Describe your capabilities in ongoing plan performance monitoring, plan performance forecasting, claims experience analysis, benchmarking and reporting.
- c) Describe your process for the enrollment of benefits for new employees and/or changes associated with existing employees, and how this information is communicated outside of the open enrollment process.
- d) How do you assure legal compliance?
- e) Describe your use of technology to support online employee services and education.
- f) Describe your processes for annual open enrollment.

5. Describe attributes that would make you a valuable strategic partner to OMC.

6. Compensation

- a) State how you expect to be compensated for the services outlined in this proposal.