

ATTACHMENT D

**RFP REVIEW COMMITTEE
EMPLOYEE BENEFITS CONSULTANT SERVICES 2012
PROPOSAL EVALUATION FORM**

BIDDERS NAME _____**OVERALL EVALUATION (circle):****Excellent Good Moderate Poor Insufficient****Comments:**

I. VENDOR COMPANY DATA

Please rate as follows: excellent, good, moderate, poor or insufficient _____

1. Does the vendor fully describe the firm's qualifications and related experience, including:
 - a. Firms organization, philosophy, management and provide a brief history.
 - b. Describe contractual relationships (e.g. outside actuarial services, data information services) required for proposal implementation.
 - c. Provide names, titles, experience of all staff providing consultation services to the County.
 - d. Confirm that they serve as a consultant or broker, independent and are not affiliated with any insurance company, third party administrator or provider network.
2. Do the vendor discuss current workload and indicate how Fresno's account will fit into that workload.
3. Are materials (e.g. letters of support) indicative of the bidder's capability included?
4. Is there a complete and satisfactory reference list?
5. Are any legal actions, license sanctions, or payment issues regarding the bidder or its employees listed?

Comments:

II. SCOPE OF WORK

Please rate as follows: excellent, good, moderate, poor or insufficient _____

1. Does the bidder provide a synopsis that reflects a broad understanding of the entire proposal?
2. Does the bidder indicate that they can provide the full scope of services as listed in Attachment A, or do they list exceptions that would or would not satisfy the County service needs?
3. Does the bidder present consultation service strategies that address the following areas listed in the RFP:
 - a. Administrative Services (Program advice and administration; strategic benefit design assistance, health management, communication and legal compliance and legislative updates).
 - b. Data Analysis and Reporting (the RFP requires an example prior years utilization report showing trends on claims and utilization using medical, dental, vision, and prescription coverage's – is this report clear, understandable and comprehensive).
 - c. Vendor Relations (describe health plan RFP and contract development, initial and renewal negotiations and analysis, and vendor management).
 - d. Actuarial, Underwriting and Fiscal Support.
 - e. Reserves/Claims Incurred But Not Reported/Projections.
 - f. Additional Fee-for-Service projects.
 - g. Provide alternate solution or recommend other services.

Comments:

VENDOR RESPONSE SECTION

Please rate as follows: excellent, good, moderate, poor or insufficient _____

The bidder's were provided 18 specific questions (copy provided in your packet) that focused on the following areas:

- Specific capabilities and qualifications and what they offer that separate them from other bidders.
- Specific knowledge of the needs and challenges facing California counties in the area of employee benefits and what their strategy to address those issues.
- Their ability to facilitate the Health Benefit Advisory Council proposal selection process and meet face-to-face with County officials.
- Their strategies for alerting clients of changes in legislative mandates, communicating changes or emerging trends in the landscape of employee benefits.
- Do they publish newsletter and other informative communication routinely and provide examples of those – overall, what is their communicate commitment and strategies?
- Do they have the resources to provide actuarial services?
- What electronic or web-based tools and resources do they provide clients?
- What is their capacity, resources, tools and strategy for benchmarking ?

Benchmarking involves looking outward (outside a particular business, organization, industry, region or country) to examine how others achieve their performance levels and to understand the processes they use.

- Describe and provide examples of reports – see Reports section.
- Describe role in managing projects like RFPs and provide a sample health benefit RFP that is all inclusive with implementation timeline.
- Describe the bidder's policy (level of transparency) for accepting contingent commission, other sources of income, revenue, consideration, compensation or overrides in connection with the services of these services.

Comments:

ATTACHMENT D**REPORTS**

Please rate as follows: excellent, good, moderate, poor or insufficient _____

- Example Utilization Report (models/data showing trends on claims & utilization including medical, dental, vision and pharmacy (mail order/retail) for the purpose of making recommendation to County for optimizing future health benefits while controlling costs.
- Sample Health Plan RFP with Timeline.
- Vendor was asked to provide all reports proposed, frequency and examples to include, health, life, disability, Flexible Savings Accounts, and other voluntary benefits.

Comments:

COST PROPOSAL

Please rate as follows: excellent, good, moderate, poor or insufficient _____

Does the proposal include a flat fee for the primary (health programs) services, materials, equipment, etc to be provided under the proposal including specific cost of the following sections in the Scope of Work?

Administrative Services	Data Analysis and Reporting
Vendor Relations	Health Management
Communication	Legal Compliance and Legislative Updates
Actuarial, Underwriting and Fiscal Support	Reserves/INBR/Projections

For the Primary (Health Benefits Consulting) Services are there any additional administrative fees beyond the flat rate fee for consulting services? _____

Does the vendor provide fee or rate structure for “Ancillary Benefits” (life/disability/voluntary)?
Are there any additional fees for the items listed below (listed in the Scope of Work)?

- Voluntary benefit RFP process? _____
- Strategic/customized consulting beyond those described in the Scope of Work: _____
- Health Management projects: _____
- Specialized Audits: _____
- Creating Plan Documents: _____
- Other fees not described above: _____

Comments: