



# Request for Proposal: Employee Benefits

## ABOUT GSI:

In 1985, at the request of the Senior Citizen Alliance of Tarrant County, the Area Agency on Aging provided funding to the United Way for a pilot project to develop a volunteer guardian program in Tarrant County for adults over sixty years of age. The project proved successful: on October 1, 1990, Volunteer Guardians became a part of Senior Citizen Services of Greater Tarrant County (now Sixty & Better). In June of 1998, Volunteer Guardians became a separate, non-profit agency called Guardianship Services, Inc. GSI was established to serve adults who needed the protection of guardianship. Two years later, recognizing the need for less-restrictive alternatives, GSI created its Money Management Program. In 2005, Money Management expanded to include a community education component.

GSI's mission is to provide guardianship or less-restrictive alternatives to guardianship for vulnerable adults in Tarrant County. In the coming plan year, we will provide benefits for a team of approximately 25 employees.

## OBJECTIVE:

Our employees work tirelessly, providing care to members of the community. They deserve the best healthcare benefits our budget can accommodate. GSI seeks a broker with a record of identifying benefit packages that meet employee needs, while managing costs.

## GENERAL INFORMATION

- 1) Provide a brief history of your firm, particularly your employee benefits division.
- 2) Who would GSI be working directly with on administrative issues, questions or problem solving? Please provide the roles and qualifications of each person. Also, include the number of clients each person is expected to handle and categorize these clients by large (500 or more), medium or small (less than 100) groups.

## ACCOUNT SERVICES

- 1) Briefly describe your account services department. What is your process for ensuring customer satisfaction?
- 2) What kind of training (industry, internal, computer, other) does your staff receive?
- 3) Do you provide employee communication services for your clients' employees? If so, please provide a general description of your capabilities, with a sample of employee communication materials that you have distributed to other clients.
- 4) How can you assist in facilitating employee meetings?
- 5) Do you help facilitate annual open enrollments?

## PLAN ADMINISTRATION AND LEGISLATIVE COMPLIANCE

- 6) Do you have an in-house benefits attorney? If yes, please provide his or her credentials and the number of years he or she has provided counsel on benefits issues. If no, do you use an external benefits attorney? Which firm do you use?
- 7) Will your firm notify GSI of changes in federal and/or local laws that would affect us?

## STRATEGIC PLANNING/VENDOR SELECTION

- 1) How will you help us with the competitive marketing and placement of our plans, including development of marketing specifications, identification of market conditions, evaluation of proposals, negotiations and placement of insurance contracts for annual renewals?
- 2) Furnish a list of insurance companies, third party administrators, and other providers for which the consultant is an authorized agent or broker.
- 3) How will you save GSI money?
- 4) How will you demonstrate the savings?
- 5) How do you review PPO discounts and what is your criteria for recommending changes in network affiliations?
- 6) What sort of benchmarking data can you provide?
- 7) How can you help us develop cost projections tied to our fiscal goals?
- 8) Who do you use for actuarial services? Please provide credentials.
- 9) How will you help with the management of insurance, including: preparation of claims activity reports from carriers; executive summary reports; underwriting analysis for annual renewals; annual financial projections for budgeting purposes

## WELLNESS PROGRAMS

- 1) What tools can you provide to help implement/continue our wellness program?
- 2) Can you provide examples of low-cost wellness tools for small organizations?

## FEES

- 1) Describe your proposed form of compensation (e.g., commission, annual retainer, and fee-for-service). If you are proposing a fee, please include your fee schedule/hourly rates.
- 2) If you charge fees for consulting and employee communication, please indicate the basis of your charges (hourly, by project, etc.) and what typical charges might be.

## REFERENCES/OTHER

- 1) Please provide references that include name, address, phone number and length of time associated with your organization. Indicate whether your firm's role was as a **broker, consultant** or **both**. Please provide a minimum of four references, including at least one that is a previous client.
- 2) Please submit via e-mail to: [gsutherin@guardianshipservices.org](mailto:gsutherin@guardianshipservices.org).
- 3) **DEADLINE FOR SUBMISSION: COB 5/15/2017**