



REQUEST FOR PROPOSAL:

EMPLOYEE BENEFITS BROKER AND CONSULTING SERVICES

Issue Date: February 18, 2020
Due Date: March 20, 2020, 2 p.m.

REQUEST FOR PROPOSAL: EMPLOYEE BENEFITS BROKER/CONSULTING SERVICES

Einstein Group, Inc. is seeking written proposals for an insurance brokerage firm to provide Employee Benefit Brokerage and Consulting services related to Einstein Group, Inc.. Technical questions or requests for clarification shall be directed, in writing, to the email address below. Einstein Group, Inc. 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.

My Tran
Einstein Group, Inc.
4801 Maid Marion Drive
New Orleans, LA 70128
my_tran@einsteincharterschools.org

1. GENERAL INFORMATION

1.1. Key Dates

The following table outlines Einstein Group, Inc. key dates and events in this RFP process.

2/18/20	RFP is available
3/2/20 – 3/13/20	Questions and Answer Period
3/20/20	Deadline for receipt of Proposals to Einstein Group, Inc. office
Anticipated 3/23/20 – 4/3/20	Interviews with selected respondents
4/24/20	Award Notice
6/1/20	Commence Work

Einstein Group, Inc. 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 Einstein Group, Inc..

1.2. Background of Company

The mission of Einstein Charter Schools (“Einstein”) is to nurture students to be academically STRONG as well as socially and emotionally resilient. Founded in 2005, Einstein Charter Schools is a top performing, tuition free, open admissions network of 4 schools in New Orleans East. Einstein has over 200 employees serving students in grades PreK-12th.

1.3. Preparation Costs

Einstein Group, Inc. 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 Einstein Group, Inc..

2.3. Modification of Proposals

Modifications to proposals will not be accepted by Einstein Group, Inc..

2.4. Late Submissions

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

2.5. Acceptance/Rejection of Submittal

Einstein Group, Inc. 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 Einstein Group, Inc.. However, the requirements for timelines shall not be waived.

2.6. Proposal Evaluation

A committee of individuals representing Einstein Group, Inc. will perform the evaluation of all proposals. Following this evaluation process, the committee may elect to ask certain respondents to complete an interview before the committee. The purpose of the interview is to allow those further selected firms expansion and discussion of their written responses.

2.7. Interviews

Interviews are provided at the sole discretion of Einstein Group, Inc. and are for the purposes of allowing Einstein Group, Inc. to broaden their understanding of certain selected respondents. Einstein Group, Inc. may, at its discretion, request interviews/presentations by or a meeting with any or all firms, to clarify or negotiate modifications to the firm's proposal. However, Einstein Group, Inc. reserves the right to make an award without further discussion of the proposals submitted. Therefore, proposals should be submitted initially on the most favorable terms, from both technical and price standpoints, that the firm can propose. Einstein Group, Inc. contemplates award of the contract to the responsive, responsible firm whose proposal is the most advantageous to Einstein Group, Inc., based on the highest total points and its decision is final.

2.8. Final Broker Selection

The final selection of the successful respondent(s) is scheduled to be completed by **April 24, 2020**. The successful respondent will assume their responsibilities on **June 1, 2020**.

By use of numerical and narrative scoring techniques, proposals will be evaluated by Einstein Group, Inc. against the factors specified below. The relative weights of the criteria—based on a 100-point scale—are shown below.

Criteria	Points
1. Qualifications, experience, references, and ability to carry out the described work	25 points
2. Plan design analysis, consultation, marketing and renewals	25 points
3. Compliance, communications and administrative support	25 points
4. Other factors, including completeness of proposal, adherence to RFP instructions, other relevant factors not considered elsewhere	25 points

3. MINIMUM QUALIFICATIONS

All brokerage firms submitting a proposal must:

- a. be licensed to do business in State of Louisiana,
- b. have the expertise, licenses and resources to provide Employee Benefit broker/consulting services for Einstein Group, Inc.'s current and future operations,
- c. consistently maintain and allocate sufficient staffing resources to provide timely service for Einstein Group, Inc.'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. Written proposals (**3 copies**) must be received at our offices no later than **2:00pm, March 20, 2020**. – *OR* – Electronic proposal must be emailed to my_tran@einsteincharterschools.org no later than **2:00pm, March 20, 2020**.
- c. Our final broker selection will be made based on our evaluation of the criteria outlined in Section 2 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 **Einstein Group, Inc.** 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 at least two innovative strategic solutions you have implemented for clients similar to Einstein Group, Inc. that highlight your benefits consulting expertise.
- b) Describe your internal mechanism for ensuring customer satisfaction with your services.
- c) Provide reference letters from local CMOs.
- d) Describe how you have supported the mission of your current partners.

4. Services

- a) Provide an overview of your approach to strategic planning.
- b) Provide an overview of your account support and administration services, including enrollment coordination and ongoing support for Einstein Group, Inc. employees.
- c) Describe your capabilities in ongoing plan performance monitoring, plan performance forecasting, claims experience analysis, benchmarking and reporting.
- d) Describe your capabilities in employee communications.
- e) Describe your consulting and educational services in the area of legal compliance.
- f) Describe your use of technology to support online employee services and education.
- g) Describe any additional service options that may be of interest to Einstein Group, Inc.

5. Describe attributes that make you a valuable strategic partner to Einstein Group, Inc.

6. Compensation

- a) Describe how you expect to be compensated for the services outlined in this proposal.
- b) State your philosophy of compensation disclosure.