

REQUEST FOR PROPOSALS

20-21-011

EMPLOYEE HEALTH BENEFITS

PROPOSALS DUE: July 28th, 2021 at 2:00 pm

NOTICE TO PROPOSERS

NOTICE IS HEREBY GIVEN that the Santa Clara Unified School District will receive up to, but no later than, **2:00 pm, July 28th, 2021**, proposals for **Employee Health Benefits**.

Proposals shall be received electronically by the SCUSD Purchasing Department at ttea@scusd.net

All interested parties may obtain a copy of the RFP by request to ttea@scusd.net

Any questions regarding this notice should be directed to both Mark Schiel (mschiel@scusd.net) and Joe Van Orsdel (jvanorsdel@claremontpartners.net)

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SECTION I – GENERAL INFORMATION

STATEMENT OF INTENT

The Santa Clara Unified School District (SCUSD, or District) and its Benefits Committee seek by way of this RFP to obtain proposals from qualified Group Purchasing Organizations to provide Employee Health Benefits services. Proposers must be able to show that they are capable of performing the services requested. Such evidence includes, but is not limited to, the respondent's demonstrated competency and experience in delivering services of a similar scope and type and local availability of the proposer's personnel and resources.

BACKGROUND

Santa Clara Unified School District serves over 15,300 K-12 students and an additional 6,000 students in preschool through adult school. Neighborhoods in the Cities of Santa Clara, Sunnyvale, San Jose, and Cupertino comprise the District's 56 square-mile area. Santa Clara Unified prides itself on having teachers, classified employees, and administrators who are dedicated, experienced professionals who care about each student's well-being and academic preparation.

The District offered Medical Coverage through 4 Kaiser Permanente HMO Plans and 4 Sutter Health Plan HMO plans. Retirees are offered 3 Kaiser Permanente Plans

Active Employees covered by Kaiser Permanente: 1,126

Active Employees covered by Sutter Health Plans: 464

Active Employees Opting Out of Coverage: 472

Retired Employees Covered by Kaiser Permanente: 116

SECTION II – RFP PROCEDURE

This section describes the general RFP procedure used by the SCUSD Purchasing Department, and the remaining sections of this RFP list detailed requirements.

A. TENTATIVE SCHEDULE OF EVENTS

EVENT		TARGET DATE
1	RFP Released	6/28/21
2	Deadline to Submit Questions	7/2/21
4	Deadline for District Responses	7/16/21
5	Proposals Submitted	7/28/21

B. SUBMISSION OF PROPOSALS

Proposers are to submit a proposal via email to: ttea@scusd.net and Joe Van Orsdel (ivanorsdel@claremontpartners.net).

Proposals received late will not be opened or given any consideration for the proposed project unless doing so is deemed to be in the best interest of the District, as determined by the sole discretion of the Director of Purchasing.

There will be no public opening of proposals. All proposals shall be firm offers, and will so be considered by the District, although the District reserves the right to negotiate terms upon evaluation of the proposals. Proposals will be considered valid offers for a period of one hundred twenty (120) days following the close of the RFP.

C. PROPOSAL EVALUATION

All proposals received will be evaluated by an RFP Evaluation Committee composed of District staff and any necessary consultants. During the evaluation process, the District may require a Proposer's representative to answer specific questions orally and/or in writing. All proposals received by the specified deadline will be reviewed by the Evaluation Committee for content, proposed service costs, and capabilities of the Vendor. The District may also require a visit to the Proposer's offices, other field visits or observations by District representatives, or demonstrations as part of the overall RFP evaluation. Once a finalist or group of finalists is selected, additional interactions or information may be required. The most qualified firm will be recommended to the Board of Education by the Director of Purchasing based on the overall strength of each proposal. The evaluation is not restricted to considerations of any single factor such as cost.

The criteria used as a guideline in the evaluation will include, but not be limited to, the following:

- Vendor qualifications and experience, including capability and experience of key personnel and experience with other public or private agencies to provide these services
- A complete and concise response to the RFP that complies with the RFP requirements
- Proposed approach, including clarity of understanding of the scope of services to be provided and appropriateness of the proposed solution/services
- Evidence of demonstrated competence and experience in the area proposed with other public agencies in California
- Cost, both initial and ongoing, to the District for the services described by this RFP
- References

The successful bidder will demonstrate:

- Variety of plan design and network choices, including but not limited to networks that include Sutter Medical Group
- Geographic breadth of the network accommodates actives (who may live as much as 90 miles from Santa Clara) and retirees and retiree survivor spouses (who may live anywhere)
- Ability to support an HSA option
- The impacts of prescription drug benefit formularies associated with the plan offerings
- Value of discounts on administration of the District's self-insured vision and dental plans, e.g., through a vendor such as VSP or Delta Dental.

This RFP is designed to develop the best solution to meet the needs of the District. Proposals will be reviewed for content, completeness, experience, qualifications, means of providing the service and price. District will select the proposal that provides the best match for the District.

By responding to this RFP, Proposer acknowledges that they may be subject to an interview by a District Committee who shall make their recommendation to the District's Board of Trustees for the award of the contract. The District reserves the right to complete the selection process without proceeding to an interview process and make a selection based solely on the information provided in the Proposal.

By responding to this RFP, Proposer acknowledges that this agreement is for the performance of a service and shall be determined upon finding the best match for the purposes of the District and that "lowest responsible bidder" requirements do not apply.

D. ADDENDA

Any addenda issued prior to the RFP due date shall form a part of the specifications for this RFP.

E. COST OF PREPARATION

All costs for preparation of proposals shall be borne by the Proposer.

F. WITHDRAWAL OF PROPOSALS

Any Proposer may withdraw their proposal by email request, confirmed prior to the deadline for receipt of proposals.

G. CONTACT WITH DISTRICT EMPLOYEES

As of the issuance date of this RFP and continuing until the final date for submission of proposals, all proposers are specifically directed not to hold meetings, conferences, or technical discussions with any

District employee for purposes of responding to this RFP except as otherwise permitted by this RFP. Any proposer found to be acting in any way contrary to this directive may be disqualified from entering into any contract that may result from this RFP.

H. AWARD OF CONTRACT

The District reserves the right to reject any or all proposals, or to waive any irregularities or informalities in any proposals. The potential award of a contract will be to the Proposer that best meets the needs of the District and can provide a comprehensive commission plan, in the best interest of the District. The selection of a Contractor will be memorialized in the form of a contract between the District and the selected Vendor, authorized by a resolution of the District's Board of Trustees and signed by both parties.

I. CONFIDENTIALITY OF PROPOSALS

Responses to this RFP becomes the exclusive property of the District upon receipt. All proposals received in response to this RFP become a matter of public record and shall be regarded as public records. A Proposer may designate elements in its proposal which are defined as business or trade secrets and plainly marked as "Confidential", "Trade Secret", or "Proprietary."

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 the Proposer who submitted the information with reasonable notice to allow the Proposer to seek protection from disclosure by a court of competent jurisdiction.

J. MISCELLANEOUS

This RFP is not a commitment or contract of any kind. The District reserves the right to pursue any and/or all ideas generated by this RFP. The District reserves the right to reject any and all proposals and/or terminate the RFP process if deemed in the best interest of the District. Further, while every effort has been made to ensure the information presented in this RFP is accurate and thorough, the District assumes no liability for any unintentional errors or omissions in this document. The District reserves the right to waive or modify any requirements of this RFP when it determines that doing so is in the best interest of the District. Finally, the District may revise or clarify aspects of the required services after proposals are submitted by communicating directly to some or all of the providers that submitted proposals.

SECTION III – SCOPE OF WORK

The District seeks to understand, evaluate, and decide upon joining a group purchasing organization for an effective date of 1/1/22 for both active employees and retirees.

Technical Questions for Respondents

1. Please provide rates and a summary of benefits and coverage for each plan that would be available to SCUSD actives and retirees. If possible, please provide both composite and tiered rates.
2. Please include administrative fees available for the District's self-insured vision and dental plans through vendor partners of your organization and a description of the service offering from the vendor partner.
3. Please include life insurance available through vendor partners of your organization and a description of the service offering from the vendor partner.
4. Please describe assistance that will be available to retirees, and survivors of retirees, for transitioning into your health plan.
5. Please provide a disruption analysis based on employee and retiree zip codes.
6. Please describe any formularies that apply to each of the plan options. For each, how many exclusions and step therapies are in place? Also, how many exclusions / step therapies apply to medications for mental health and asthma?
7. If SCUSD desires to continue its cash-in-lieu program, how would this be accommodated?
8. Is dual coverage available if two spouses or domestic partners cover each other as dependents? Please describe how this would impact the member's out of pocket costs.
9. Please describe any pending litigation to which your organization is a party.
10. How would SCUSD participate in the governing board for your organization?
11. Please provide a copy of a participation agreement or contract that SCUSD would be required to sign. Please ensure that termination / exit provisions are clearly identified.
12. What assistance do you provide to the District to assist in the management of initial enrollment, open enrollment and the decision-making process for the participant?
13. How is eligibility maintained and updated? What is the accepted/preferred media for submitting eligibility? What is the frequency?
14. Please tell us what is unique about your organization.
15. List five client references (preferably public entity clients) for Districts similar in size to this District. Please provide the client name, contact name, telephone number, and employee enrollment.

SECTION IV – RFP PROPOSAL FORM

The undersigned acknowledges receipt of above referenced RFP and/or Addenda and offers and agrees to furnish the articles and /or services specified on behalf of the vendor indicated below, in accordance with the specification, terms and conditions of this RFP.

VENDOR: _____

ADDRESS: _____
 Street City State Zip

NAME: _____ **TITLE:** _____

SIGNATURE: _____ **DATE:** _____

EMAIL: _____ **PHONE:** _____

SECTION V – ENCLOSURES

1. Rates per Plan for 2020 and 2021
 - a. Kaiser Permanente,
 - b. Sutter Health Plan,
 - c. Dental,
 - d. Vision, and
 - e. Life

2. Plan Design Summaries for Kaiser Permanente, Sutter Health Plan, Dental and Vision. Life volume and amounts are shown on the Life Census/monthly billing.

3. Census of Actives
 - a. Kaiser Permanente
 - b. Sutter Health Plan
 - c. Life
 - d. Dental and vision do not have separate census

4. Census of Retirees plus plan options.

5. District / Employee Cost Sharing by % FTE