

Technical Proposal Questionnaire

In a concise manner, provide answers to each of the questions listed. The response should list the question and then the answer.

1. Briefly provide an overview of your company including ownership, changes of ownership, strategic alliances in the last 3 years, and other lines of business of the company.
2. Provide a listing all Human Resources & Benefit consulting offerings you provide and the length of time your company has provided these services. Detail the number of staff in your organization by employee classification, i.e., executive, analysts, administrative, support, etc...
3. Specify the primary contact for each major area of service in this proposal, including credentials and experience. Describe how this person will function within your organization to provide the requested services.
4. Outline your consulting practice experience, providing 2-3 specific examples with regard to designing and coordinating RFPs for employer sponsored health plans, and describe your database/resources for providing comparisons with other employer sponsored health plans. Include two examples of your experience with assisting clients in negotiating rates with vendors.
5. Discuss your services surrounding rate setting with respect to short and long term strategy. Include an overview of the financial modeling tools used to assess financial impact of initiatives. Describe your data systems, software, strategic evaluation programs providing detail of the ways those services will bring an enhanced benefit to WCPS.
6. Describe how your firm informs clients about the changes, innovations, legislation, and technology in the ever-changing employee benefits genre. Include internal company resources such as databases, meetings, conferences, and other external training sources.
7. With an emphasis on groups similar to WCPS's unique needs, provide at least three examples of effective advocacy in claims management or contract disputes over the last five years.
8. Provide an overview of customer services features (i.e., benefit portals, web sites, etc.) your organization provides.
9. Provide information regarding any participation your firm has had in groups or government committees on the evaluation of retiree benefit plans, particularly health plans, to include pre-65 and Medicare-eligible designs. Include what changes were recommended, such as health plan design, eligibility rules, and the cost management of such plans.
10. Outline a wellness plan for WCPS employees, to include your organization's philosophy on how wellness should be managed. What supports is your organization prepared to provide.
11. Describe your consulting practice capability for assisting employers with designing benefit communications. Provide 2-3 examples of communication materials.
12. Describe two examples of specific recommendations for corrective action your firm has provided to a client as a result of a recent audit. Include specific examples of recommendations you feel were the most effective and produced the most tangible results.
13. Detail your company's actuarial experience pertaining to OPEB liability.

14. Describe any areas or processes, included in full service consulting that your firm may recommend in order to provide more complete services and consulting support. Provide rational for recommending these additional areas or processes.

Compliance Checklist

Complete the compliance task list below for one or both consulting options.

Fee for Service Task List	Can Comply	Cannot Comply
Assist in the RFP process		
Rate Setting/negotiation		
Legislation/innovation updates		
Plan design review/long term strategy planning		
Vendor contract disputes/re-negotiation		
Audit Services		
Attend periodic meetings		
Process RDS rebates		

Full Service Task List	Can Comply	Cannot Comply
Assist in the RFP process		
Rate Setting/negotiation		
Legislation/innovation updates		
Plan design review/long term strategy planning		
Vendor contract disputes/re-negotiation		
Customer Service Features		
Wellness planning/supports		
Communication planning/materials		
Attend periodic meetings		
Process RDS rebates		
Full legal and regulatory compliance evaluation		

Date: _____

Company Name: _____

Submitted by (Print): _____

Signature: _____