



JOLIET JUNIOR COLLEGE
—1901—

REQUEST FOR PROPOSAL

#R20010

Employee Benefits Broker and Consulting
Services



JOLIET JUNIOR COLLEGE

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Joliet Junior College
Request for Proposal

RFP Opening April 21, 2020

Background

Joliet Junior College (JJC), the nation's first public community college is a comprehensive community college. The college offers pre-baccalaureate programs for students planning to transfer to a four-year university, occupational education leading directly to employment, adult education and literacy programs, work force and workplace development services, and support services to help students succeed. The College has a combined total of 14,912 full time and part time students enrolled in Spring 2018 classes and 1,950 staff on its main campus located within the city of Joliet, and its 5 extension campuses located in Romeoville, Morris, Frankfort, Weitendorf, and City Center in downtown Joliet.

JJC is the only public postsecondary institution within District 525 boundaries. JJC is located approximately 45 miles south of Chicago, the third largest city in the United States. Today, the 1,442-square mile district serves over 700,000 residents in Will, Grundy, Kendall, LaSalle, Kankakee, Livingston, and Cook counties. Multiple locations exist to serve residents throughout the district. The College consists of one (1) main campus (2) extended campuses, three (3) education centers, and multiple satellite locations throughout the district.

JJC has approximately 15,000 students per year enrolled in credit courses.

Vision Statement

Joliet Junior College is the first choice for learning, working and cultivating pathways to prosperity.

Mission Statement

Joliet Junior College inspires learning, strengthens communities and transforms lives.

OVERVIEW

The Board of Trustees of Joliet Junior College (hereinafter, "JJC") is requesting proposals from Providers for services relating to Employee Benefits Broker and consulting services for day-to-day benefits customer service abilities including assisting college management with strategic planning, underwriting/actuarial services, vendor management, administrative/communication support, financial reporting, carrier marketing and negotiations and legislative and corporate compliance support as detailed in the Scope of Services section of the proposal.

Additional scope is discussed in the **SCOPE OF WORK** section of this proposal.



I. RFP SCHEDULE

Date	Event
March 25, 2020	Vendors contacted via email / advertised
April 9, 2020 at 12:00 Noon	Last date/time for submission of written questions through the ESM sourcing solutions tool under the Q & A section.
April 14, 2020 by end of day	Responses to questions will be addressed through the ESM sourcing solutions tool under the Q & A section.
April 21, 2020 by 2:00 PM (CT)	Proposals must be submitted electronically through the ESM Solutions electronic sourcing
Week of April 27, 2020	JJC Evaluation Team reviews proposal
Week of May 4, 2020	Possible presentations by top 2-3 short-listed firms
June 18, 2020	Notification of Award

II. INSTRUCTIONS TO VENDORS

ADVICE: The department responsible for this RFP is the Business and Auxiliary Services located at Campus Center, Building A, Room 3100, 1215 Houbolt Rd., Joliet, IL 60431-8938. The JJC contact will be Janice Reedus, Director of Business & Auxiliary Services, telephone (815) 280-6640; fax (815) 280-6631.

Questions concerning this RFP will be answered if sent through the ESM sourcing solutions tool, under the Q & A section for the solicitation on or before **April 9, 2020** before 12:00 p.m. CST.

All questions and answers will be published on the ESM sourcing tool in the Q&A section by end of business day on **April 14, 2020**.

SUBMISSION: the submission of a response shall be prima facie evidence that the supplier has full knowledge of the scope, nature, quality of work to be performed, the detailed requirements of the project, and the conditions under which the work is to be performed.

Faxed and hard copy proposals ARE NOT acceptable. All RFPs must be submitted by the date and time of public opening (see above). All proposals must be submitted electronically through the ESM Solutions electronic sourcing site. Please note that all vendors will have to complete an on-line registration process prior to submitting your proposal.



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A step-by-step [supplier registration guide](#) is posted to the college's website for your reference. [General supplier guides](#) are also available on the ESM website. If you have any questions during the registration process, contact ESM Solutions Customer Support (877) 969-7246 Option 3.

Registration Link:

<https://supplier.esmsolutions.com/registration#/registration/contactInformation/>

General Supplier Guide (ESM Documents): <https://support.esmsolutions.com/hc/en-us/sections/115000917048-Supplier-Guides>

Supplier Registration Guide (JJC Document):

<https://www.jjc.edu/sites/default/files/Purchasing/FY2019/Supplier%20Registration%20Screenshots%20Final.pdf>

Please note the electronic sourcing tool will allow you to attach supporting documentation.

RFPs not submitted in the format as instructed by this RFP will not be accepted.

RFPs received after the date and time specified shall be considered LATE, and shall not be opened.

Accuracy of Proposals / Withdrawal of Proposals prior to RFP Opening: Proposals will represent a true and correct statement and shall contain no cause for claim of omission or error. Proposals may be withdrawn in writing or by facsimile (provided that the facsimile is signed and dated by vendor's authorized representative) at any time prior to the opening hour. However, no proposal may be withdrawn for a period of one hundred twenty (120) days subsequent to the opening of the RFP without the prior written approval of the Director of Business and Auxiliary Services or Joliet Junior College.

ADDENDA: The only method by which any requirement of this solicitation may be modified is by written addendum.

PROPOSAL DUE DATE: The proposal must be received through the ESM sourcing solution on or before **April 21, 2020 by 2:00 PM (CT)**.

INSURANCE:

The supplier performing services for JJC shall:

Maintain worker's compensation insurance as required by Illinois statutes, for all employees engaged in the work.

Maintain commercial liability, bodily injury and property damage insurance against any claim(s), which might occur in carrying out the services, referenced in this RFP. Minimum coverage will be TWO MILLION DOLLARS (\$2,000,000) liability for bodily injury and property damage including product liability and completed operations.

Provide motor vehicle insurance for all owned, non-owned and hired vehicles that are used in



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carrying out the services described in this RFP. Minimum coverage shall be TWO MILLION DOLLARS (\$2,000,000) per occurrence combined single limit for automobile liability and property damage.

TAXES:

JJC is exempt from all federal excise, state and local taxes unless otherwise stated in this document. In the event taxes are imposed on the services purchased, JJC will not be responsible for payment of the taxes. The supplier shall absorb the taxes entirely. Upon request, JJC's Tax Exemption Certificate will be furnished.

INDEMNIFICATION:

The supplier shall protect, indemnify and hold JJC harmless against any liability claims and costs of whatsoever kind and nature for injury to or death of any person or persons and for loss or damage to any property occurring in connection with or in any incident to or arising out of occupancy, use, service, operations or performance of work in connection with the contract, resulting in whole or in part from the negligent acts or omissions of the supplier.

DISCLOSURE:

Vendor shall note any and all relationships that might be a conflict of interest and include such information with the bid.

TERM OF CONTRACT:

Any contract, which results from this RFP, shall be for a period of **four (4) years** from the date of the contract award. Assuming continued availability of funding; JJC may, at its sole option and with the consent of the supplier renew the contract for up to an **additional (1) one-year term**.

BLACKOUT PERIOD:

After the College has advertised for proposals, no pre-proposal vendor shall contact any College officer(s) or employee(s) involved in the solicitation process, except for interpretation of specifications, clarification of bid submission requirements or any information pertaining to prebid conferences. Such vendors making such request shall email Janice Reedus, Director of Business & Auxiliary Services, at purchasing@jjc.edu No vendor shall visit or contact any College officers or an employee until after the proposal is awarded, except in those instances when site inspection is a prerequisite for the submission of a proposal. During the black-out period, any such visitation, solicitation or sales call by any representative of a prospective vendor in violation of this provision may cause the disqualification of such bidder's response

III. GENERAL TERMS AND CONDITIONS

Applicability: These general terms and conditions will be observed in preparing the proposal to



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be submitted.

Purchase: After execution of the contract, purchases will be put into effect by means of purchase orders or suitable contract documents executed by the Senior Director of Business and Auxiliary Services.

Right to Cancel: JJC may cancel contracts resulting from this RFP at any time for a breach of any contractual obligation by providing the contractor with thirty-calendar days written notice of such cancellation. Should JJC exercise its right to cancel, such cancellation shall become effective on the date as specified in the notice to cancel.

Governing Law and Venue: This contract shall be construed in and governed under and by the laws of the State of Illinois. Any actions or remedies pursued by either party shall be pursued in the State and Federal Courts of Will County, Illinois, only after Alternate Dispute resolution (ADR) has been exhausted.

Dispute Resolution: JJC and the contractor shall attempt to resolve any controversy or claim arising from any contractual matter by mediation. The parties will agree on a mediator and shall share in the mediation costs equally.

Costs: All costs directly or indirectly related to preparation of a response or oral presentation, if any, required to supplement and/or clarify a proposal shall be the sole responsibility of and shall be borne by the vendor.

Proprietary Information: Vendor should be aware that the contents of all submitted proposals are subject to public review and will be subject to the Illinois Freedom of Information Act. All information submitted with your proposal will be considered public information unless vendor identifies all proprietary information in the proposal by clearly marking on the top of each page so considered, "Proprietary Information." The Illinois Attorney General shall make a final determination of what constitutes proprietary information or trade secrets. While JJC will endeavor to maintain all submitted information deemed proprietary within JJC, JJC will not be liable for the release of such information.

Illinois Department of Human Rights Act

The parties to any contract (inclusive of subcontractors) resulting from this RFP hereto shall abide by the requirements of Executive Order 11246, 42 U.S.C. Section 2000d and the regulations thereto, as may be amended from time to time, the Illinois Human Rights Act, and the Rules and Regulations of the Illinois Department of Human Rights. Any vendor awarded a contract as a result of this RFP must comply with the Illinois Department of Human Rights Equal Opportunity Act/Rules Sections 750.5 and 5/2-105.

Sexual Harassment Policy

Pursuant to Section 50-80 of the Illinois Procurement Code, each bidder who submits a bid or offer for a State of Illinois contract under this Code shall have a sexual harassment policy in accordance with paragraph (4) of subsection (A) of Section 2-105 of the Illinois Human Rights



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Act. A copy of the policy shall be provided to the college entering into the contract upon request.

Illinois Criminal Code of 1961

Responding vendors must not be barred from bidding on this or any other contract due to any violation of either Section 33E-3 or 33E-4 of Article 33E, Public Contracts, of the Illinois Criminal Code of 1961, as amended. This certification is required by Public Act 85-1295. This Act relates to interference with public contracting, bid rigging and rotating, kickbacks and bribery.

Business Enterprise Program (BEP):

Minorities, Females, and Persons with Disabilities Participation and Utilization Plan:

Joliet Junior College will make every effort to use local business firms and contract with small, minority-owned, and/or women-owned businesses in the procurement process. This solicitation contains an aspirational goal of 20% utilization to include businesses owned and controlled by minorities, females, and persons with disabilities in the College's procurement and contracting processes in accordance with the State of Illinois' Business Enterprise for Minorities, Females, and Persons with Disabilities Act (30 ILCS 575). Because these goals vary by business ownership status and category of procurement, we urge interested businesses to visit the Department of Central Management Services (CMS), Business Enterprise Program (BEP) web site to obtain additional details. To qualify, prime vendors or subcontractors must be certified by the CMS as BEP vendors prior to contract award. Go to <http://www2.illinois.gov/cms/business/sell2/bep/Pages/default.aspx> for complete requirements for BEP certification. For applicable projects, vendors may be asked to submit a utilization plan and letter of intent that meets or exceeds the identified goal. If a vendor cannot meet the goal, documentation and explanation of good faith efforts to meet the specified goal may be required within the utilization plan.

Negotiation: JJC reserves the right to negotiate all elements, which comprise the vendor's proposal to ensure the best possible consideration, be afforded to all concerned. JJC further reserves the right to waive any and all minor irregularities in the proposal, waive any defect, and/or reject any and all proposals, and to seek new proposals when such an action would be deemed in the best interest of JJC.

Award: The successful vendor, as determined by JJC, shall be required to execute a contract for the furnishing of all services and other deliverables required for successful completion of the proposed project. The supplier may not assign, sell, or otherwise transfer its interest in the contract award or any part thereof without written permission from JJC.

Retention of Documentation: All proposal materials and supporting documentation that are submitted in response to this proposal becomes the permanent property of JJC.

Opening of Proposals: Proposals will be opened in a manner that avoids disclosure of the contents to competing vendors. Contents for proposals will remain confidential during the negotiations period. Only the proposal number and the identity of the vendor submitting the proposal response will be made available to the public.



IV. FORMAT FOR RESPONSE

To achieve a uniform review process and obtain the maximum degree of comparability, it is required that the proposal be organized in the format specified.

All proposals must be submitted via email through the ESM Solutions electronic sourcing site. Please note that all vendors will have to complete an on-line registration process prior to submitting your proposal. See item II above for more information.

a. Title Page

Show the RFP subject, the name of the vendor's firm, address, telephone number, name of contact person, and date.

b. Table of Contents

Clearly identify the materials by sections and page number(s).

c. Letter of Transmittal

Limit to one or two pages.

- a. Briefly state the vendor's understanding of the scope of services to be provided and make a commitment to provide the services within the time period.
- b. List the names of the persons who will be authorized to make representations for the vendor, their titles, address, and telephone numbers.

d. Profile of the Vendor

- a. Indicate the number of people in the organization and their level of experience and qualifications and the percentage of their time that will be dedicated to this process.
- b. Describe the structure of the team assigned to our program.
- c. Describe your strategy for communicating plan changes to employers and employees.
- d. Describe your use of technology to deliver superior customer service.
- e. Describe what actions you employ to ensure customer satisfaction.
- f. Explain how wellness factors into your service offerings.
- g. Delineate your risk management capabilities.
- h. Provide a list of your top five current and two prior clients indicating the type of services the organization has performed for each client.
- i. Submit independently audited financial statements (one copy only). Such information will be considered in strict confidence.
- j. Indicate any third-party firms involved with your program and state their role(s).
- k. Provide contact information (name, phone number, and email address of at least



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three (3) references, preferably higher ed institutions, for projects of similar size and scope.

1. Relate why your firm would be a perfect partner for our organization.

e. Scope Section

Clearly describe the scope of services to be provided based upon the information in the scope section. Respond to each item listed.

f. Prices Responses

g. Invoicing Procedure

- a. Describe the firm's invoicing procedures.
- b. Include documentation identifying all of the vendor's fees.

h. Proposed Contract

Please submit a draft contract for the services being offered.

i. Bidder's Certification Statement

V. EVALUATION

In evaluating the proposals submitted, JJC will apply the "Best Value" standard in selecting the supplier to be awarded a contract for this project. Purchase price is not the only criteria that will be used in the evaluation process. Any award resulting from this RFP will be made to that vendor whose offer conforms to the RFP and it is determined to be the most advantageous, of "best value" to JJC, in the sole judgment of JJC. The selection process will include, but not be limited to, the following considerations:

1. The quality and range of services the firm proposes to provide.
2. The extent to which the goods or services meet JJC needs.
3. The firm's overall experience, reputation, expertise, stability and financial responsibility.
4. The vendor's past relationship with JJC, if any.
5. The experience and qualifications of the staff that will be assigned to service JJC's account.
6. The ability to provide service in an expedient and efficient manner.
7. Vendor's ability to provide technical experience to meet service requests.
8. Quality and range of management reports
9. Vendor's financial terms offered to JJC.
10. The training options available.
11. The total, long-term cost to JJC to acquire the vendor's goods and services.
12. BEP Certification or Utilization.
13. Any other relevant factor that a private business entity would consider in selecting a supplier.



VI. SCOPE OF WORK

1. Strategic Planning

- a. Assist JJC in employee benefit strategic planning by conducting trend-analysis forecasts.
- b. Assist JJC in the development, implementation and ongoing management of an effective and measurable wellness program that will reduce health and welfare cost over the long term.
- c. Assist JJC toward the development and/or use of a comprehensive on-line benefits enrollment option. Work with JJC on coordination and integration with vendors and JJC's ERP system.
- d. Participate in insurance committee, board and management presentations involving benefit strategies and issues.
- e. Keep JJC informed about issues and changes in the benefits marketplace. Provide information regarding trends and benchmarks in the benefits field.
- f. Provide, maintain, and update comparison reports of other colleges, universities and other organizations' benefit plan offerings and costs to determine their competitiveness to JJC programs as needed.
- g. Serve as a source of general expertise for various benefit issues JJC may encounter.
- h. Review and make recommendations regarding value-added benefit plans and programs, as well as modifications to the design, cost (rates), communications, and quality of current employee benefit plans, and other related programs.
- i. Provide a service plan schedule yearly to ensure that JJC is compliant with all benefit related deadlines.

2. Underwriting/Actuarial Services

- a. Provide actuary services as needed. Calculate and recommend appropriate premium rates and administrative fees to maintain the viability of the plans, ensuring quality and cost-effective benefits are provided by the plans.
- b. Provide actuarial costing of legislative proposals for mandated benefit programs.
- c. Analyze large claims.
- d. Validate rates needed to cover insured plan liabilities.
- e. Maintain full and accurate records with respect to all matters and services provided on behalf of JJC's benefits plans and programs.
- f. Assist JJC by pricing and analyzing benefit change options; project effect of possible benefit changes on plan costs. Review and evaluate carrier projections.
- g. Assist with the development, negotiation and implementation of health and welfare providers on various topics, including, but not limited to, premium rates, benefit levels, performance standards and guarantees, contractual terms and conditions, quality assurance standards, utilization and performance reports, statistical and/or financial reports, and where applicable, plan-specific data such as medical conditions, prescriptions drugs, high cost procedures and in-patient data.

3. Utilization Reporting

- a. Provide detailed quarterly reporting and analysis. Collect claims experience and



participation data from vendors and JJC, to include the following data:

- i. Premium or fixed costs, paid claims, and loss ratio of each line of coverage or subgroup level.
 - ii. Experience categorized by type of participant, such as active employees, spouses and children;
 - iii. Experience categorized by the type of service provided.
- b. Medical and dental reports, to include number of claims processed, number of eligible employees covered, cost per claim processed.
- c. Prepare financial exhibits that provide JJC with the information needed to make informed decisions regarding JJC's benefits plan designs and funding levels.

4. Vendor Management

- a. Provide support in the day-to-day management of vendors and resolve administrative issues; assist with claims and billing issues as requested, and conduct periodic meetings as necessary.
- b. Assist JJC with RFP process for third party administrators for any of our benefits as identified and needed.
- c. As directed, negotiate all insurance vendor contracts, services and renewals with vendors, including meeting directly with insurance company underwriters.
- d. Create performance guarantees for all insurance carriers providing services to JJC.
- e. Analyze insurance proposal criteria, review all insurance, benefit and administrative service documents for accuracy and adherence to prior agreements, and manage carrier/vendor relationships.
- f. Review contracts with providers for accuracy in rates, benefits, eligibility, and coverage definitions.
- g. Review carrier service levels and compare performance guarantees; resolve problems regarding vendors' services and performance.

5. Administration/Communications Support

- a. Assist Human Resources and Financial Services with the administration of all group/individual insurance plans. Respond to questions and provide information to Human Resources department staff. Upon request respond to employees' questions directly.
- b. Assist JJC with the implementation and communication of new programs or changes to existing programs, which will include attending and presenting information at employee insurance committee meetings, open enrollment meetings, to senior leadership and to the Board of Trustees.
- c. Develop, modify and update employee benefits materials used for open enrollment meetings/presentations, and educational/promotional materials. (PowerPoint, plan summary booklet, educational materials, newsletters, etc.)
- d. Provide customer service and assistance to JJC and employees with issues involving provider billing, advocacy for services, disputes, interpretation of services, etc.
- e. Assist with entire open enrollment planning process each year, including, but not limited to, developing a timeline, assisting with the development of open enrollment materials and coordination and participation in open enrollment



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- meetings. Assist in final review of open enrollment communications material.
- f. Assist with maintenance of JJC hosted benefit website as an employee resource.
- g. Attend annual employee benefit/wellness expo/vendor fair. Coordinate attendance of representatives from various plan providers.
- h. Attend quarterly employee insurance committee meetings to provide updates on benefit changes, updates and future initiatives.
- i. Provide regular and timely communication of changes and proposed changes in State and Federal statutes and regulations that may impact JJC's employee benefits plans and programs. Recommend procedures and/or policies.
- j. Provide routine biweekly phone meetings between broker and benefits team and track action items and planning.
- k. Develop and/or assist in developing and evaluating employee engagement and satisfaction surveys.

6. Compliance

- a. Monitor emerging trends and insurers'/vendors' financial status.
- b. Provide research and professional advice on new developments in benefits law (both proposed and enacted) and programs both state and federal, making sure JJC is always current on any new developments and/or requirements relative to legally administering its benefits plans, i.e. Patient Protection and Affordable Care Act (PPACA), HIPAA, COBRA and others.
- c. Assist in COBRA, HIPAA, and PPACA compliance, including review and preparation of SPDs and Plan Documents.
- d. Review pertinent contract and other legal documents to ensure that they accurately reflect negotiated benefits, services and terms.

VII. QUANTITY

There is no guaranteed amount of services intended either expressly or implied, to be purchased or, contracted for by JJC. However, the supplier awarded the contract shall furnish all required services to JJC at the stated price, when and if required.

VIII. PROPOSED PRICING

The vendor should furnish a list of proposed prices for all services and materials to be used during the term of the contract. The list of proposed prices should be structured to allow for the calculation of unit cost analyses. The prices included herein are to be firm through the contract term, unless noted otherwise by the vendor.



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CERTIFICATION OF CONTRACT/BIDDER

The below signed contractor/bidder hereby certifies that it is not barred from bidding on this or any other contract due to any violation of either Section 33E-3 or 33E-4 of Article 33E, Public Contracts, of the Illinois Criminal Code of 1961, as amended. This certification is required by Public Act 85-1295. This Act relates to interference with public contracting, bid rigging and rotating, kickbacks and bribery.

SIGNATURE OF CONTRACTOR/BIDDER

TITLE

DATE

THIS FORM **MUST** BE SUBMITTED ELECTRONICALLY WITH YOUR BID THROUGH THE ESM SOLUTIONS ELECTRONIC SOURCING SITE.