



Benefit Technology Solutions

Request for Proposal

Park Hill School District

December 3, 2024



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CBIZ Employee Benefits
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I. Introduction

Client Name

Park Hill School District (PHSD)

Business

Park Hill School District serves students in a 73 square mile area in Platte County, Missouri and is fully accredited by the state of Missouri. PHSD has approximately 1,667 full-time benefit eligible employees. Approximately 122 retirees participate in the medical options. PHSD consists of 11 elementary, four middle, two high schools, an innovation studio for high school level students, a day school for students with special needs, an Early Childhood Education Center, an aquatic center, support services facility, and administrative facility. Estimated student enrollment for the current school year approximates 11,659 (K-12).

Client Information

| | |
|-------------------------------|--|
| Address | 7703 NW Barry Road, Kansas City, MO 64153 |
| Locations | Missouri |
| Covered Population | Full-time employees and retirees, their spouses/domestic partners, and children; Part-time employees based upon their contract with the District |
| Eligibility | New hires are eligible on the first of the month following date of hire |
| Expected Participation | 1,540 employees and retirees participate (1,789 eligible) |
| Current Vendor | CBIZSolutions Custom |

Goals and Objectives

The top priority for PHSD is

Proposal review will be evaluating how each vendor responds to these key critical elements:

- a. Competitive Pricing
- b. Weekly electronic data interface with benefit vendors
- c. Weekly bi-directional electronic data interface with client’s HRIS
- d. Efficiency and effectiveness of administrative tools
- e. Billing support
- f. Ease of online enrollment
- g. Decision support tools
- h. High level of customer service

Current Solution

The current system providing service requested is CBIZSolutions Custom, a proprietary online enrollment, communication and administrative system. Additional services include project management, consolidated billing and a dedicated customer service representative. This system will run concurrently through the end of plan year 2025 with open enrollment services provided by the new system. CBIZSolutions Custom agrees to provide necessary data transfers for a smooth transition.

Client HRIS

PHSD utilizes the Alio system for HRIS and payroll processing. Based on recent experience, one of the key challenges for this engagement is related to sending election information back to Alio.

Open Enrollment

Open enrollment will be an active enrollment requiring all employees to affirm, approve, waive or make new elections. To ease the enrollment process, PHSD seeks a technology solution that will pre-load the personal data and employee benefit elections currently maintained in CBIZSolutions Custom and the Alio payroll/HRIS systems.

Requirements and Respondent Capability

Please complete the table below and send back with your proposal.

Response Key

| | |
|--------------|--|
| YES | Yes, this feature is available as part of the standard package |
| YES-P | Yes, only partially (please describe in detail, or we reserve the right to change this response to NO) |
| YES-C | Yes, this feature is available but required customization |
| FR | This feature will be available in a future release (within the next 6 months) |
| NO | This feature is not available in the system |
| N/A | Not applicable |

| Requirement | Response | Details |
|--|----------|---------|
| 1. PHSD requires the ability to go into the administrative system and make retroactive adjustments to benefit elections, eligibility and start and end-dates (up to the limit defined by each insurance contract, typically 90 days). Please indicate if your system has the ability to notify insurance companies (via EDI) of these retroactive adjustments. | | |
| 2. The system must have the ability to track beneficiaries both primary and contingent. | | |

| Requirement | Response | Details |
|---|----------|---------|
| 3. PHSD desires a dedicate customer service representative and call center support for employees. | | |
| 4. Easy to use and flexible reporting capabilities for both standardized and customized reports. | | |
| 5. Provide benefit portal for employees to log into the system to print forms or access information such as the summary plan documents, benefit guides, etc. throughout the year. | | |
| 6. Able to account for various types of employee contracts (9-, 10-, and 12-month employee contracts). | | |
| 7. Able to manage various payroll schedules (12, 18, 20, and 24 pays). | | |
| 8. Park Hill does provide special benefit pricing for employees that are married. The system needs to be able to link these employees together and show their benefit cost. | | |
| 9. Employees and new hires must be able to access platform by SSO. Microsoft Entra is the preferred SSO method. | | |
| 10. Former employees, retirees, and COBRA participants must be able to access with a non-SSO login. The platform will need to accommodate both SSO and non-SSO logins simultaneously. | | |
| 11. The platform must be able to handle multiple secure custom data feeds. | | |
| 12. The platform must provide secure data feeds to multiple carriers. | | |
| 13. The platform must be easy to use for both administration and end-user. | | |
| 14. Park Hill would like the ability to have customized reporting that is exportable to a csv file. | | |

| Requirement | Response | Details |
|---|----------|---------|
| 15. PHSD requires that the system can provide report for 1094/1095 reporting requirements. The report needs to provide the demographic information and medical benefit elections for all eligible employees and their dependents. | | |
| 16. The data must be housed in the United States and provide data-masking for SSN transmission. | | |
| 17. Park Hill prefers that the development team for the platform is located in the United States. | | |
| 18. Park Hill requires a dedicated in-house implementation manager (not a 3 rd party) and dedicated ongoing support team. | | |
| 19. Provide decision support tools for employees during enrollment. | | |
| 20. The system must be able to be accessed on various platforms. I.e., smart phones, Microsoft Edge, Safari, Chrome, etc. | | |
| 21. The platform must be offered as stand-alone that does not require participation or product requirements. | | |
| 22. Employee portal must be able to be customized with client specific branding. | | |
| 23. Employee enrollment experience should be easy to use and engaging. | | |

Timeline

Please submit any questions related to this marketing to Susan Endicott (sendicott@cbiz.com) and Michelle Conn (mconn@cbiz.com) no later than **December 11, 2024**. Submit one electronic copy of your proposal to Susan Endicott (sendicott@cbiz.com), Michelle Conn (mconn@cbiz.com), and Jo Ann Blakely (BlakelyJ@parkhill.k12.mo.us) no later than **4:00 p.m., January 10, 2025**.

If you elect to decline quotation, please advise us prior to the due date. It is the goal of PHSD to finalize all vendor decisions relative to this RFP by March 31, 2025.

| | |
|-------------------------------|-----------------------------------|
| CBIZ RFP Contact | Susan Endicott and Michelle Conn |
| CBIZ Producer | Jim Vigliaturo and Caitlin Waters |
| Effective Date | April 1, 2025 |
| Proposal Due Date | January 10, 2025 |
| RFP Questions Due | December 11, 2024 |
| Responses to Questions | December 18, 2024 |
| Vendor Decision Date | March 31, 2025 |

II. Proposal Specifications

General

Contract

The contracts are to be issued in the State of Missouri. Contracts are between PHSD and vendor. CBIZ assumes no liability or guarantees for payment or service.

Guaranteed Rates

Proposals with multi-year rate and/or fee guarantees will receive the most favorable consideration.

Account Structure

PHSD’s account structure for eligibility and benefits will be broken out by full-time employees and retirees by location as well as department.

Current Benefits and EDI

| Renewal Date | Product | Vendor | EDI |
|--------------|------------------------------|---|-----------------------|
| January 1 | Medical | Blue Cross and Blue Shield of Kansas City | Weekly to BCBS |
| January 1 | Dental | Blue Cross and Blue Shield of Kansas City | Weekly to BCBS |
| January 1 | Vision | VSP | Weekly to VSP |
| January 1 | Life and Optional Life | Ochs | Annual to Ochs |
| January 1 | Voluntary STD and LTD | One America | Weekly to Amerilife |
| January 1 | Section 125 | Tri-Star | Weekly to Tri-Star |
| January 1 | Legal Plan | MetLife | Weekly to MetLife |
| January 1 | Accident Insurance | MetLife | Weekly to Amerilife |
| January 1 | Critical Illness Insurance | MetLife | Weekly to Amerilife |
| January 1 | Hospital Indemnity Insurance | MetLife | Weekly to Amerilife |
| January 1 | Identity Theft Protection | Aura by MetLife | Weekly to MetLife |
| January 1 | Pet Insurance | PetPartners | Weekly to PetPartners |
| | Payroll/HRIS | Alio | Weekly |

Rights to Records

All records and eligibility data used shall remain the property of PHSD.

Proposal Contacts

Your proposal should be provided to Susan Endicott and Michelle Conn at CBIZ.

Direct all communications concerning this Request for Proposal in writing to CBIZ. Under no circumstances may a vendor contact PHSD regarding this RFP. All correspondence and discussion related to this RFP should be treated confidentially.

Renewal Notice

After the initial fee guarantee period has expired, PHSD requires that any change to fees and other pricing are effective on July 1 of each year and notice of any fee/pricing change must be provided at least five months in advance.

Cancellation Provisions

After the first year, PHSD reserves the right to terminate its contract without cause, by providing at least 30 days in advance. PHSD can terminate with cause with 30 day notice unless proper remedy is provided by vendor. The vendor may only terminate for cause with proper legal minimum notice requirements.

Should you be awarded this business, you agree to assist with transition of data in the future should PHSD select a new vendor at no additional cost.

Hold Harmless

The vendor shall be responsible for and agree to indemnify and hold harmless PHSD from damages to property or injuries (including death) to any person(s) and any other losses, damages, expenses, claims, demands, suits and actions by any party against PHSD in connection with the work performed by the vendor.

Confidentiality Agreement

Information relative to this RFP may not be released to parties external to this process without the written consent of PHSD and CBIZ. In addition, CBIZ and PHSD agree to hold the information you provide in the strictest confidence and will not share your proposal responses with others outside of our respective organizations in accordance with the law.

Vendors Errors/Omissions

Neither PHSD nor CBIZ will be responsible for errors or omissions made in your proposal. You will be permitted to submit only one set of proposals. You may not revise or withdraw submitted proposals after the deadline date. After that, revisions to your original submission will not be allowed except as requested by CBIZ or PHSD.

III. Questionnaire

General

1. We will assume that you will provide 180-day final renewal rates. Please state if you are not able to meet this requirement.
2. Do you agree to maintain proper licensure as required by any state law where it relates to the services that you will be performing for PHSD?
3. Do you agree to provide no less than 60 day notice to PHSD for any changes involving the sale, merger, data breaches, layoffs, participating provider facility terminations, consolidation or outsourcing of services to foreign workers that will impact PHSD?

Company Overview

1. Briefly describe your company's history, number of employees, number and location of your primary offices and years in existence.
2. What is your average client size?
3. How many clients do you have that are similar in size to PHSD?
4. How many clients do you have that are public school district?
5. Is online benefit administration and enrollment your company's core product/service? If not, what is your core business?
6. Identify subcontracted relationships, if any, and explain how your company will be responsible for their performance.
7. Provide the location from which our account will be serviced and description of services that will be provided through that office.
8. Please list all services provided by your company.

Scope of Services

1. Provide a concise description of all work experiences as they relate to the scope of work, including but not limited to background information about organization.
2. Describe the qualifications and skills of the organization and project team to provide the services, including but not limited to qualifications to perform the services, qualifications and resumes of team members and other employees who will be managing and performing the services, indicate services to be subcontracted and subcontractor(s) to provide said services. Provide a description of the firm's specific strategies, experience & professional capability to undertake the Scope of Work Requested.

3. Provide a detailed overview of the benefit enrollment process during open enrollment and for new hires.
4. Provide a description of the proposed approach. Activities and timelines should be specific, measurable, achievable, realistic, and time oriented. Include a timeline of major tasks and milestones.
5. Please provide examples of past integrations with our current payroll system, Alio.
6. If your company does not have experience working with Alio, can you implement an integration of data to the required Alio format? Please include past examples of integrations with other payroll systems and a projected implementation timeline for Alio.
7. What value-added services will your company provide for PHSD? What are the costs associated with them?
8. Provide a detailed plan of action and any other requirements needed for changing from PHSD's current benefits administration system over to your system. The selected partner will work closely with PHSD and the District's benefit's consultant to ensure a smooth transition and will be expected to have all phases functional for an effective date of no earlier than 10/1/2025.

Technology

1. Do you own or lease the proposed enrollment platform? If you do not own proposed platform, please identify the subcontractor and explain how your company will be responsible for their performance.
2. Please provide an overview of the system capabilities, functionality and additional modules that may be available.
3. Describe the capabilities of a system administrator posting documents (SPD, Benefit Highlights) to the website, posting weekly articles, adding links, videos, etc.
4. Describe the process during transition between plan years and how your system handles enrollment for current plan year and open enrollment. For example, is there a different look to the open enrollment site, a welcome page, mapping over of enrollment for new hires into new plan year enrollment.
5. Please describe any customized or ad hoc reporting capabilities. Please specify any additional cost for customized or ad hoc reporting.
6. Provide a sample listing of the standard reports available to administrators.
7. Is reporting available in real-time? If not, how frequently is the data updated?
8. What is the typical turnaround time for special request reports? (i.e., 10 days, 30 days)

9. PHSD current solutions provides monthly billing statements for each carrier from which PHSD uses to pay the monthly premiums due to the carriers. Are you able to provide the same service? If so, please include a sample of your monthly billing statement.
10. Describe your online self-service capabilities for the administrator and employees.
11. Describe your transition plan to begin providing services.
12. Do you provide any decision support tools for end users? If so, please describe. Is there additional cost involved to implement?

Security

1. State the company's ability and guarantee to maintain confidentiality of PHSD information as well as employee information as a related to Health Insurance Portability and Accountability Act (HIPAA) law. Confidential Information shall mean (a) those materials, documents, data, and other information which the selected partner has designated in writing as proprietary and confidential, and (b) all data and information which the selected partner acquires because of its contact with and efforts on behalf of PHSD and any other information designated in writing as confidential by the PHSD. Each party to this agreement agrees to protect all confidential information provided by one party to the other; to treat all such confidential information as confidential to the extent that confidential treatment is allowed under State and/or federal law and, except as otherwise required by law, not to publish or disclose such information to any third party without the other party's written permission and to do so by using those methods and procedures normally used to protect the party's own confidential information. Any liability resulting in the wrongful disclosure of confidential information on the part of the selected partner, or its affiliates shall rest with the selected partner.
2. Do you have certifications (ex. ISO 27001, SOC, PCI, HIPAA, etc.)? Please provide documentation.
3. Does your company hire an external audit firm to perform a compliance review of your operational controls? If yes, how often.
4. Do you have a formal process for purging all files and records and removing accesses upon completion of the service, task, or contract? Please provide description or policy.
5. Will files and records be periodically reviewed for retention and purging purposes? Please explain how you will meet legal, contractual, and service level requirements.
6. Will you comply with all applicable privacy and security laws for PHSD? Please explain how.
7. Does your company carry cybersecurity insurance? If yes, please provide information regarding carrier, limits and any special coverages you may purchase.
8. Does your company have a written control plan that contains the administrative, technical, and physical safeguards you use to collect, process, protect, store, transmit, dispose, or otherwise handle our data (e.g., Information Security Plan)? Please provide.
9. Does your system or application which will be storing our data provide access control mechanisms (e.g., unique user IDs, passwords standards, role-based access)?

10. Does your system or application provide multi-tenant controls for separation of users and data within the service?
11. Does your company utilize encryption methods for data in transit and data at rest where technically possible and legally permissible? Please explain (i.e. use of data serialization for privacy).
12. Does your company have a written business continuity/disaster recovery plan, which is tested on a periodic basis? Please describe your plan.
13. Does your company ensure adequate steps are taken to guard against unauthorized access to data (e.g., firewall)? Please list the technology and processes that are in place.
14. Will your company actively monitor and manage your IT security environment to prevent security incidents or breaches?
15. Does your company perform application security testing?
16. Will third party vendors (e.g., subcontractor, managed shared hosting) be used by your company and be restricted from having access to the system or application data of PHSD?
17. Do you plan to or have agreements with any third parties that could allow them to collect or use our data?

Data Exchange

1. Please identify the types of data that can be imported to your system, and any limitations in data importing (e.g., dependent elections, beneficiaries, benefit elections, etc.).
2. Please identify the types of data that can be exported from your system.
3. What validation measures are performed to ensure all records on the file load accurately?
4. Once in production, how will you confirm EDI files have been 1) sent, 2) received and 3) loaded?
5. How are file/eligibility errors identified and resolved? Who is the responsible party for working the discrepancies?

Implementation

1. What is your implementation service philosophy?
2. Describe the implementation team and structure. Provide a description of each function and the background, skills, and experience of each team members.
3. Are there different teams for implementation versus ongoing account management? Please explain.
4. What is the location and hours of operation (including time zone) for the implementation team?

5. What is your required implementation timeframe in business days? Submit a preliminary implementation plan that clearly identifies critical dates, the process and which party is responsible.
6. Describe the training available to administrators during implementation and ongoing.
7. Do you provide the client with system user manuals? If yes, are they updated periodically?
8. Does your organization track member satisfaction during implementation? If so, please describe the measurement tool and provide recent results.

Account Management

1. What is your philosophy on client services?
2. Please describe your account management structure and teams. What level of support can be expected on an ongoing basis? Are the personnel who are assigned to implementation also responsible for ongoing service?
3. Please describe typical account support structure, including any program/account management and business development staff.
4. What training and support will you provide to the client's personnel?
5. Does your organization have dedicated technical resources who coordinate with the client's payroll department and carriers?
6. Please describe your reporting capabilities during implementation, annual enrollment and ongoing enrollment?

Communications

1. Does your company provide communication materials to support enrollment events or other client initiatives? If so, are these services provided with in-house resources, or do you partner with an outside company?
2. To what extent can open enrollment communication materials be customized? Are they available in languages other than English?
3. In what formats do you provide open enrollment, new hire and other communication materials to employees? Please provide samples.
4. What is the typical turnaround time for special request reports? (i.e., 10 days, 30 days)
5. Do you offer decision support tools during enrollment? Please provide samples.