ASHWAUBENON
SCHOOL DISTRICT

REQUEST FOR QUALIFICATIONS

EMPLOYEE BENEFITS CONSULTING AND BROKERAGE SERVICES

RELEASED OCTOBER 26, 2026

DUE NOVEMBER 20, 2026 1:00 CST

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RFQ Issue Date October 26,, 2026

Dear Sir or Madam,

The Ashwaubenon School District (The District) is seeking written proposals for an Employee Benefits Service Provider to provide Employee Benefits Brokerage and Consulting services**.** Technical questions or requests for clarification shall be directed, in writing, to the email address below. The District's responses to a proposer's question(s) will be provided via email and also posted publicly on the District's website to the proposer asking the question(s), and any other respondents. The District will not accept any questions in any other format.

Name **Janelle Marotz, CPA, SFO, CSRM**
The District **Ashwaubenon School District**
Address **1055 Griffiths Lane**
City, State Zip **Green Bay, WI, 54304**
Telephone **920-492-2905 X 1005**
Email address **jmarotz@ashwaubenonk12.org**

1) GENERAL CONDITIONS AND SCOPE OF SERVICES SOUGHT

The Ashwaubenon School District is seeking proposals from qualified employee benefit brokerage and consulting firms to manage its comprehensive employee benefits program. The selected partner will provide immediate strategic guidance and brokerage services for the District's self-funded medical, self-funded dental, life, disability, and vision plans ahead of the January 1, 2027 renewal cycle. Following a long-standing, valued partnership with Brown & Brown, the District is independently marketing its program to secure a "right-fit" partner. This partner will help maximize the advantages of its self-funded structures, drive innovative cost-containment strategies, and maintain a high-performing benefit experience for its 348 covered employees (1,036 total enrolled members).

Scope:

The vendor will provide specialized benefit services per the scope of services.

1. The Ashwaubenon School District (the District) is looking for a Benefit Services provider (Vendor) for benefit consulting services with services to begin on January 1, 2027.

2. Please see section 2.9 for the term of the contract.

3. The fixed fee is in lieu of standard agent commissions normally paid to the vendor by any carriers involved for medical, pharmacy, stop loss, dental, vision, life/AD&D, disability, EAP, identity theft, near site clinic and spending/savings accounts.. Any agent commissions received by the vendor for any of those lines will be credited by the vendor against invoices. Refer to section 6 for further details.

4. This agreement and fees cover all the listed services in the attached scope of services. Fees for additional services requested or required by the District will be separately negotiated.

Scope of Services

The successful firm shall be able to perform or provide the following services. These services shall include but not be limited to:

Strategic Planning / Marketing

· Developing near-term and long-term benefit and health management strategies with The District leadership
. Market evaluation (all lines as needed and mutually agreed upon)
· Bidding/negotiating for employee benefits coverages and related vendor services
· Comparative proposal (all lines)
· Recommendations
· Contribution modeling
· Ongoing consulting throughout the year to assess opportunities to maximize program efficiency and reduce risk

Health Management/Wellness

· Near site clinic consulting and support
· Wellness plan design
· Coordination of biometrics screening and/or other wellness program vendors
· Review of aggregate biometrics screening report/benchmarking
· Onsite visits to go over the results of biometric screening and recommend wellness strategies
. Compliance/HR Support (including but not limited to: PCORI Fee calculations, ACA minimum value affordability analysis, compliance notices, plan document review)
· Legislative support (including but not limited to: timely legislative updates, access to seminars and webinars hosted by compliance department)
· Identify and advise on basic federal notice and disclosure requirements that apply to the group
· Health plans and/or employees under various employee benefits and employment laws
· Monthly newsletters and breaking legislative alerts
· Human Resource support tools
· Access to resource portal, webinars, and updates
· Access to staff development programs (including free monthly compliance webinars)

Reporting

· Monthly financial reporting in calendar- and fiscal-year deliverables
· Provide analytics on plan performance with program recommendations – annually at minimum
· Annual claims analysis report

Account Management /Service

· Plan design analysis and benchmarking.
· Conduct open enrollment meetings and/or create a training video (BrainShark)
· Assistance with employee benefits communications
· Resolutions of benefit service issues for employer and covered employees/dependents
· Telephone consultation, face-to-face meetings, office time, reports, faxes, emails, and other correspondence
. Provide general and technical guidance on employee benefits issues to include market analysis, trends, contract and statute interpretation, and cost containment methods

1.1. Key Dates

The following table outlines The District's key dates and events in this RFQ process.

October 26, 2026	RFQ is available
November 9, 2026	Questions and Requests for Clarification Due
November 13, 2026	Questions and Requests for Clarification Provided
November 20, 2026	Deadline for receipt of Proposals to The District's office or via email.
Week of November 30, 2026	Oral Interviews with selected respondents
Week of December 7, 2026	Selection completed/contract negotiations begin

The District reserves the right to extend the submission deadline or any other deadline or date indicated in the RFQ in the event that an extension would be in the best interest of The District.

1.2. Background of the *District*

The District is seeking qualified companies to provide professional assistance in employee benefit consulting services, as well as brokerage services for medical, pharmacy, stop loss, dental, vision, life/AD&D, disability, EAP, identity theft, nearsite clinic, and spending/savings accounts.. The District needs to go out to market for its renewals for a January 1st, 2028 renewal.

The District extends its sincere gratitude to Brown & Brown (formerly Hays Companies) for their dedication, guidance, and the valuable support they have provided throughout our long-standing partnership. As we look to the future, our goal is to build upon this solid foundation by evolving our approach to meet the changing needs of our workforce and community. To ensure we are maximizing the true advantages of our self-funded medical and dental structures, the District has decided to independently market its employee benefits program at this time. We view this transition as an exciting, collaborative opportunity to welcome a "right-fit" partner who will work hand-in-hand with us to champion innovative cost containment strategies, protect our fiscal resources, and continue our tailored, high-performing benefit experience that serves our employees beautifully. The selected partner will begin work immediately to prepare for the upcoming insurance renewal effective January 1, 2028.

Please refer to the attached addendum with the District 2026 Benefits guide for a summary of the current employee benefits program. Our current covered lives for employee health insurance is 1,036 members based on average year-to-date membership. The District also offers a robust wellness program.

Clinic Background and History

Established in February 2015, the A+ Clinic was created to serve the health-insured employees and families of both the Ashwaubenon School District and the Village of Ashwaubenon. Operating in partnership with

Bellin/Emplify Health, the clinic provides dedicated, high-quality care designed to improve employee well-being while positively impacting the organization's bottom line.

The clinic's evolution highlights its success and consistent growth:

• Initial Model (2015): Launched utilizing an offsite model at the Bellin Clinic on Commanche Avenue alongside dedicated space at the Ashwaubenon Village Hall.

• Onsite Expansion (2018): To accommodate rapid patient growth, the District constructed and opened a fully customized, onsite clinic at Ashwaubenon High School in the fall of 2018.

• Comprehensive Care Expansion: Over its history, the clinic has expanded far beyond standard primary care to offer comprehensive services, including physical therapy, occupational therapy, and specialized wellness coaching.

Celebrating over a decade of service, the A+ Clinic continues to serve as a vital benefit, fostering deep trust within our insured population and delivering measurable health and financial value through a dedicated, proactive healthcare delivery mode

Current Status & Operational Continuity:

• Three-Year Agreement: We are currently finalizing a new three-year agreement to extend this successful healthcare partnership.

• Ratification Timeline: This agreement is expected to be fully ratified by the time this RFQ is released, ensuring long-term operational continuity, administrative stability, and uninterrupted service delivery.

1.3. Preparation Costs

The District shall not be responsible for proposal preparation costs, nor for the cost, including attorney fees associated with any administrative, judicial, or other types 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/Withdrawal of Bids

The content of all proposals will be kept confidential throughout the selection process. A bid once delivered to the formal custody of the Ashwaubenon School District may not be withdrawn until after the bids are opened and acknowledged, and no bid may be withdrawn for a period of forty-five days from the opening thereof. Once the Ashwaubenon School District has received documents all documents become the property of the Ashwaubenon School District. When documents are opened they become public information and any restrictions put upon the school district regarding the sharing of information or duplicating copies after opening will be grounds to reject those proposals.

2.2. Disposition of Proposals

All materials submitted in response to the RFQ shall become the property of The District.

2.3. Modification of Proposals

Modifications to proposals will not be accepted by The District.

2.4. Late Submissions

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

2.5. Acceptance/Rejection of Submittal

The District reserves the right to reject any or all responses to this RFQ, to waive minor irregularities in any proposal or in the RFQ 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 District. However, the requirements for timelines shall not be waived.

2.6. Proposal Evaluation

A committee of individuals representing the District will perform the evaluation of all proposals. Following this evaluation process, the committee may elect to ask certain respondents to complete an oral 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. Oral Interviews

Oral interviews are provided at the sole discretion of the District and are for the purpose of allowing the District to broaden its understanding of certain selected respondents.

2.8. Final Broker Selection

The final selection of the successful respondent(s) is scheduled to be completed by **December 15, 2026,** the successful respondent will assume their responsibilities on **January 1, 2027.**

Based on the results of the evaluation process and selection criteria, the Evaluation Committee will prepare a prioritized ranking of firms. The Board of Education will approve the award. District staff will present an agreement to the top-ranked firm for Employee Benefits Consulting and Brokerage Services. Should contract negotiations fail with the top-ranked firm, the District will enter into discussions with the second-ranked firm, and so on, until an acceptable agreement has been reached between the District and the selected firm.

Proof of insurance and a W9 form from the successful proposer is required at the time of issuance and award of a contract.

2.9. Term of Contract

The contract will be for an initial three (3) year term. The District reserves the right to renew the contract for up to two (2) additional one-year periods upon mutual written agreement. There shall be no automatic renewals.

2.10. Addenda and Interpretations

No interpretations of the meaning of the plans, specifications, or other contract documents will be made orally to any bidder. Prospective bidders must request from the Director of Business Services such interpretation in writing. To be considered, such a request must be received 10 calendar days prior to the bid opening. Requests must reference the date of bid opening, bid title, and bid number. Failure to comply with this condition will result in bidders waiving their rights to dispute the proposal. Any and all interpretations and any supplemental instructions will be in the form of a written addendum which, if issued, will be posted on the District website and not later than (3) days prior to the opening of bids. Failure of any bidder to receive any such addenda or interpretation shall not relieve any bidder from any obligation under their bid as submitted. All addenda so issued shall become a part of the contract document.

2.11. Governing Policies and Procedures

All Proposals shall be made in accordance with all applicable Federal and State statutes, Board policies, and administrative guidelines. Standards of conduct covering conflicts of interest and governing the actions of its employees engaged in the selection, award, and administration of contracts are established in Policy 1130, Policy 3230, and Policy 4230 – Conflict of Interest.

2.12. Collusion of Vendors

Collusion of Vendors is cause for rejection of all Vendors thus involved.

2.13. Award

Ashwaubenon School District will make the award. The District reserves the right to award this bid in part or to reject any or all proposals, to waive any informality, and to accept the proposal deemed to be in the best interest of the District. No change or alteration of proposals will be considered after the bid opening.

2.14. Hold Harmless Provisions

The Vendor agrees to protect, defend, indemnify, and hold harmless the Ashwaubenon School District and its respective officials, employees, agents, and representatives against loss claim, liability, tort or by statute imposed, charge, cost, or expense, including without limitation, attorney's feed which may be incurred with connection with, or in any manner of damage or loss arising from disclosure of proprietary information.

2.15. Compliance with Provisions of RFQ

Proposals must be prepared in compliance with the provisions of this bid request. Failure to comply with all provisions of this bid request may result in disqualification of the proposal.

2.16. Right to Use Proposed Ideas

The District reserves the right to use ideas from any of the proposals in negotiating the final contract with the highest-ranked vendor(s).

3. MINIMUM QUALIFICATIONS

All brokerage firms submitting a proposal must meet the following baseline requirements at the time of submission:

Licensing & Financial Stability

- **State Licensing:** Be fully licensed and in good standing to conduct insurance and employee benefits business in the State of Wisconsin.
- **Errors & Omissions Insurance:** Maintain and provide evidence of Professional Liability (Errors & Omissions) insurance with a minimum limit of **$2,000,000 per occurrence**.

Firm & Personnel Experience

- **Professional Longevity:** The brokerage firm, or the lead designated Account Executive, must possess a minimum of **ten (10) years of experience** providing licensed employee benefits consulting services.
- **Dedicated Resource Allocation:** Consistently maintain, allocate, and identify sufficient, qualified staffing resources to ensure timely, daily account management and specialized technical/legal expertise.

Public Sector & Self-Insured Expertise

- **School District Capacity:** Document experience serving at least **three (3) K-12 public school district accounts** with **400 or more employees**, managing programs of similar size,

nature, and complexity to the Ashwaubenon School District.

- **Self-Insured Health Plans:** Demonstrate current or recent experience managing at least **three (3) public school district accounts** utilizing a **self-insured health plan structural model**.
- **Onsite Clinic Integration:** Possess proven experience optimizing and integrating benefit plans alongside **onsite employee health clinics**, specifically focusing on patient engagement and claims impact.
- **Insurance Committee Governance:** Demonstrate successful experience actively advising, collaborating with, and presenting to **collaborative public sector insurance committees**.

Marketplace Integrity Directive

- **Underwriter Lockout:** Proposers **shall not contact the insurance marketplace** or discuss the District's account with any underwriters until a final broker selection has been officially determined by the District. **Failure to comply with this restriction will result in immediate disqualification.**

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 **(5 copies)** must be received at our offices no later than ***November 20, 2026 1:00 p.m CST***. *and* Electronic proposals must be emailed to ***jmarotz@ashwaubenonk12.org*** no later than ***November 20, 2026, at 1:00 p.m CST***.
c. *If you will not be bidding on this producer/service, please let us know by submitting the* Statement of No-Bid *on the last page of this RFQ.*
d. Our final broker selection will be made based on our evaluation of the criteria outlined in Section 6 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, Experience, and Strategic Alignment

1.1 Company Profile & Market Presence

Provide a comprehensive overview of your firm to establish your operational scale and business philosophy. Your response must include:

- **Organizational baseline:** Total years in business, current firm size, annual volume of business, and primary office locations.
- **Core philosophy:** The foundational business values guiding your client relationships and service delivery.
- **Industry influence:** A description of your firm's overall visibility, leadership, and market leverage within the employee benefits sector.

1.2 Public Sector & Funding Model Expertise

The District extends its sincere gratitude to Brown & Brown (formerly Hays Companies) for their dedication, guidance, and the valuable support they have provided throughout our long-standing partnership. As we look to the future, our goal is to build upon this solid foundation by evolving our approach to meet the changing

needs of our workforce and community. To ensure we are maximizing the true advantages of our self-funded medical and dental structures, the District has decided to independently market its employee benefits program at this time. We view this transition as an exciting, collaborative opportunity to welcome a "right-fit" partner who will work hand-in-hand with us to champion innovative cost containment strategies, protect our fiscal resources, and continue our tailored, high-performing benefit experience that serves our employees beautifully. The selected partner will begin work immediately to prepare for the upcoming insurance renewal effective January 1, 2027.

Proposers must demonstrate a proven track record managing independent structures by providing:

- **Dual-funding proficiency:** Demonstrated success advising on both self-funded and fully insured benefit programs.
- **K-12 public sector experience:** Documented expertise managing insurance and benefits programs for school districts or similar government employers.
- **Client footprint:** A current roster of school district relationships (local or national) that are not already listed in your formal references.

1.3 Specialized Clinic Integration & Committee Governance

The District co-owns and operates the "A+ Clinic," a mature, fully customized onsite health clinic at Ashwaubenon High School. Additionally, benefit decisions are vetted through a collaborative public sector insurance committee. Please detail your specific experience with the following:

1) **Onsite clinic optimization:** Proven strategies for integrating employee benefit designs with an onsite medical clinic to maximize patient engagement, maintain continuity with healthcare partners, and reduce overall claims impact.
2) **Committee collaboration:** Successful history of presenting data, building consensus, and advising public-sector insurance committees.
3) **Fiscal performance:** Tangible, recent examples of achieved cost savings and successful containment methods within volatile, high-cost healthcare markets.

Onsite Clinic Integration and Cost Management Expertise

The District co-owns and operates the "A+ Clinic," a customized, onsite healthcare facility located at Ashwaubenon High School. Operating in partnership with an external healthcare delivery partner, the clinic provides primary care, physical/occupational therapy, and wellness coaching to our insured population.

a) Please provide a detailed narrative demonstrating your firm's specific capabilities, methodology, and experience in managing and optimizing onsite clinics:
b) Cost Optimization & ROI: Describe your proven experience and technical skill in generating measurable cost savings through onsite clinic models. Provide specific examples of how you have successfully bent the healthcare cost curve for employers with existing clinics.

c) Clinical Data & Claims Analysis: Detail your process for tracking, analyzing, and reporting on onsite clinic utilization. How do you integrate clinic data with self-funded medical claims to identify savings, manage high-cost claimants, and evaluate the clinic's true return on investment?

d) Vendor & Partner Management: Outline your experience collaborating with healthcare systems and third-party clinic operators. How do you assist employers in negotiating clinic contracts, establishing key performance indicators (KPIs), and ensuring accountability from the clinical partner?

e) Benefit Design Alignment: Describe your approach to structuring employee benefit plan designs, incentives, and wellness initiatives to actively drive employee and dependent engagement toward the onsite clinic.

2. Account Team Qualifications

a) Provide an overview of the account team that would be assigned to the District**.** For each member of the team, provide highlights outlining qualifications and experience. Provide a summary of roles and distribution of responsibilities.

b) Provide a resume for each individual that will be assigned to work on our account. Include account executives, account managers, marketing personnel, and other specialists that would actively work with the Ashwaubenon School District. Include an estimate of each key person's allocated time to the Ashwaubenon School District's account. Include an organizational chart identifying the team and reporting structures.

c) Provide a profile of the proposed account executive's current District assignments. Your response should include the number of accounts, their complexity, and some reference to time allotments for each.

3. References/Strategy

a) Describe at least two innovative strategic solutions you have implemented for Districts similar to the District that highlight your benefits consulting expertise.

b) Describe your internal mechanism for ensuring customer satisfaction with your services.

c) Provide contact names, email addresses, and phone numbers of 3 references of similar size, complexity, or with similar needs. Limit your response to those Districts that are principally serviced by your local office.

d) Separately, provide a description of services and resources that may be introduced to the District over time that may add value to its employee benefits program or other business objectives.

e) Provide an overview of your approach to strategic planning.

f) Provide an overview of your account support and administration services, including enrollment coordination and ongoing support for Ashwaubenon School District employees.

g) Describe your capabilities in ongoing plan performance monitoring, plan performance forecasting, claims experience analysis, benchmarking, and reporting.

h) Describe your experience and skills in cost savings of onsite clinics.

i) Describe your capabilities in employee communications.

j) Describe your consulting and educational services in the area of legal compliance.

k) Describe your use of technology to support online employee services and education.

l) Describe any additional service options that may interest the District**.**

5. Describe attributes that make you a valuable strategic partner to the Ashwaubenon School District

6. Compensation/Cost of Service

Proposals shall include an annual service fee as part of their response to this RFQ. The successful firm shall be compensated on an annual fee basis. Fees will be payable quarterly at the end of each quarter. All program premiums and charges are to be written net of commission.The un-disclosed acceptance or retention of a commission shall be grounds for immediate termination. If a carrier does not or cannot work on a net of commission arrangement, the firm shall disclose this fact and the commission shall be deducted from the annual fee. The successful firm shall provide an annual statement from each carrier confirming that the insurance carrier has paid no commissions. Full disclosure of all compensation earned, either directly or indirectly, is required. The use of intermediaries, wholesalers, subsidiary companies, etc. is expected and encouraged if advantageous to the Ashwaubenon School District. However, all fees and or commissions earned as a result of their use must be disclosed and will be deducted from the annual fee. Additionally, the District reserves the right to seek additional relevant records as a means of enforcing this provision.

Refer to the attached Cost Schedule below in section 6 that is to be included in your proposal.

6. Compensation

a) Furnish lump sum inclusive annual cost for all Employee Benefits Consulting and Brokerage Services specified herein and in specific relation to Section 1 of this RFQ. Additional explanation and rationalization can be provided in sections 6b and 6c below.

ANNUAL LUMP SUM COST $_____
IN WORDS_____

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

Pricing is for services for the initial annual term.

The vendor will specify in the bid response any bid alternatives.

The District makes electronic payments. This solicitation has the potential for P-Card Payment. Does your company accept credit card payments?
YES____ NO____
If "yes" please indicate payment options on the below chart.

Payment Options	**Yes**	**No**	**Percent and/or terms for early payment**
Is there a discount for a credit card payment?			
Is there an additional charge for credit card payments?			
Discount for early payment?			
Prompt payment terms:_____% _____Days; Net 30 Days			

Company Name:_____
Name:_____
EIN:_____
Email: _____

Name and Title of the individual completing this schedule:

_____
(Printed Name) (Title)

_____
(Signature) (Date)

STATEMENT OF NO BID/PROPOSAL

If you do not intend to submit a bid or proposal on this requirement, please complete and return only this page. Please return via email to jmarotz@ashwaubenonk12.wi.org or by mail to: Ashwaubenon School District, Janelle Marotz, 1055 Griffiths Lane Ashwaubenon, WI 54304.

We, the undersigned, decline to bid on the above project for the following reason(s):

___ We are not able to respond to the Invitation to bid by the specified deadline.

___ Our company does not offer this product or service.

___ Our current work schedule will not permit us to perform the required services.

___ Unable to meet insurance requirements.

___ Unable to meet RFQ specifications.

___ Specifications are incomplete, or information is unclear (Please explain below).

_____

_____

Other (Please specify below)

_____

_____

Company Name_____

Phone _____ Email_____

Name and Title of individual completing this form:

_____

(Printed Name) (Title)

_____

(Signature) (Date)