



## Proposers To Be Interviewed

# Health and Welfare Benefits Management Services #1004

### Finalists invited to Interview:

ASSURANCE  
HUB INTERNATIONAL MIDWEST LIMITED  
GALLAGHER

### 1. Tentative Project Award Schedule

Interviews Scheduled for: **December 7<sup>th</sup>, 2018: 8:30-10:00; 11:00-12:30; 2:00-3:30;**

**The team that will be servicing the City of St. Charles shall be present at the interview.**

- Please contact [Procurement@stcharlesil.gov](mailto:Procurement@stcharlesil.gov) to reserve your timeslot. Timeslots will be scheduled as requested on a first come first served basis.

### 2. Clarification of Offers:

- a. The City may conduct discussions with Proposers to further clarify the offer as may be necessary.
- b. The City reserves the right to seek clarification of proposals . Clarifications shall be documented by the Proposer and submitted to [Procurement@stcharlesil.gov](mailto:Procurement@stcharlesil.gov) within 2 business days.

### 3. Evaluation Process

- a. Proposals of the above firms have been deemed Responsive.
- b. Proposer Qualifications have been reviewed and deemed responsible.
- c. Proposed Fees have been analyzed for totality of costs.
  - Please be prepared to discuss your role as a consultant and how that role differs from a broker.
  - Be prepared to discuss how broker fees/compensation impacts your cost proposal.
- d. Finalists may be invited for an interview.
  - i. Proposers may be required to submit additional data during the interview process.
    - Please be prepared to discuss:
      - i. Day-to-day Management: Provide detail on what you include in your day-to-day management. This should cover regular occurrences such as claim resolution, sporadic occurrences such as vendor issues, or annual occurrences such as open enrollment activities.
      - ii. Criteria that you will use to determine the best funding arrangement for the city which may include co-op/pools
      - iii. Financial planning to include financial analysis, trending, and your role in determining COBRA and employee rates for insurance
      - iv. Explain how you handle the renewals for insurance to include negotiating of contracts, etc.
      - v. Describe how you analyze the effectiveness of the City's insurance programs
- e. After interviews, finalists will be invited to submit a one-page letter inclusive of clarifications and present a Best and Final Offer.
  - Letter, should you decide to submit one, is due prior to **8:00am Wednesday December 12, 2018.**
    - i. The City reserves the right to negotiate the price and any other term with the proposer offering the Best and Final offer.
    - ii. If a negotiated agreement cannot be reached with the front runner, the City may proceed to negotiate with the second best and final offer.
    - iii. Any oral negotiations must be confirmed in writing to [Procurement@stcharlesil.gov](mailto:Procurement@stcharlesil.gov) prior to award.
- f. The City's determination of award for best overall value will consider the following non-exclusive list: available project management resources, soft costs of contract management; and training costs.

### 4. Basis of Award

- a. Award is based on the best overall value to the City; and deemed most advantageous to the City, based on the totality of lawful considerations, price and other factors considered.
- b. While numeric evaluations may be used in some aspects of the process to identify strengths and weaknesses of proposals, and to establish a ranking, the final decision will be a business decision by the City and will not be based

on a numerical score. A recommendation to award will document the basis for the award decision.

c. Except as otherwise stated, proposers will be awarded within ninety (90) days from the opening date.

d. The City reserves the right to award a shorter term of service, by phase, part or portion of a phase, any line item or option regardless of order listed.

***The City wishes to thank all Proposers for participating in this solicitation. The City recognizes and appreciates the time and effort your firm put into preparing and submitting your proposal. The City invites you to respond to future solicitations which are posted on the City's website at <https://www.stcharlesil.gov>.***

**The City of St. Charles is looking for ways to reduce costs and create better returns for our investments. Please advise the City if you have any suggestions that can provide: cost savings; quality improvements; improved resource utilization; versatility; standardization; modification in delivery; inventory or consignment practices; value analysis; or other.**