



USI Insurance Services
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Torrance, CA 90503
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July 10, 2019

RE: **Superior Court of California, County of San Bernardino**
REQUEST FOR PROPOSAL (RFP): Employee Assistance Program (EAP): RFP 20-04, Effective January 1, 2020
Due by: TUESDAY, JULY 30, 2019, 3:00 P.M., PST – NO LATE PROPOSALS WILL BE ACCEPTED

To Whom It May Concern:

We are conducting an Employee Assistance Plan (EAP) marketing survey for our valued client, the Superior Court of California, County of San Bernardino (The Court). You are invited to submit a proposal for Employee Assistance Program benefits with a January 1, 2020 effective date. Their zip code is 92415 and SIC code is 9211.

This RFP is composed of two documents:

- 1) USI Insurance Services' RFP cover letter with requested specifications and
- 2) The Court's official RFP that contains requirements and process for contracting vendors. **You** are responsible for reviewing **both** documents in their entirety.

COURT BACKGROUND:

The Court holds jurisdiction over San Bernardino County, the largest county in the United States, geographically, covering over 20,000 square miles and serving more than two (2) million people. The County has three distinct geographical areas: desert, valley and mountains.

The Court has 73 judges and 15 subordinate judicial officers who hear court proceedings in 12 locations: Barstow, Big Bear, Colton, Fontana, Joshua Tree, Needles, Rancho Cucamonga, four (4) sites in San Bernardino, and Victorville. There are 1,268 employees covered on the EAP who service the needs of the Court by providing administrative and clerical support. This number includes 73 Judges and there are an additional 130 terminated employees.

CURRENT BENEFITS PROGRAM:

Currently the Court offers a 100% employer paid EAP plan through ACI Specialty Benefits. The services offered include the following:

- Thorough face-to-face assessment/referral process (3 visit model)
- Toll-free, 24/7, 365 day-a-year call center
- Critical Incident/Crisis Management
- Unlimited Employee Orientation

- Unlimited Wellness Seminars/Workshops
- Unlimited Management Training/Orientation
- HR Support including supervisory referrals for employee work performance and difficult employee problems, substance abuse case management and support for return-to-work transition, and support during reductions in workforce.
- Unlimited Printed Promotional Materials including customized promotional materials including brochures, posters, wallet cards, and more.
- Please quote current benefits and include the following:
 - GEO Access reports based upon all 145 zip codes listed on the census. The Courthouse locations should be used for the active employees and Judges and the remainder of the zip codes reflect the terminated employees. The parameters should include: 2 providers within 10 miles

REQUEST FOR PROPOSAL (RFP) CONTENT – YOU WILL NEED TO ACCESS THESE DOCUMENTS FROM THE COURT’S WEBSITE PROVIDED BELOW):

- ACI Service Agreement
- ACI Summary for Open Enrollment
- Census (Court Locations and Terminated Employee Zip Codes)
- ACI Utilization Reports
- EAP RFP 20-04 Benefits Matrix- **MUST BE COMPLETED**
- Superior Court of California, County of San Bernardino RFP (including attachments) – **MANDATORY!! PLEASE READ AND HAVE YOUR COMPLIANCE REVIEW THE COURTS’ TERMS AND CONDITIONS. ALL MANDATORY TERMS AND CONDITIONS MUST BE ACCEPTED IN ORDER FOR YOUR PROPOSAL TO BE CONSIDERED.**

MAIN PROPOSAL REQUIREMENTS:

- A. Please provide your rates net of commission; 0%.
- B. The Court’s current EAP offers many services as well as printed employee education materials at no cost per the summary of benefits. Please include these provisions in your quote. Don’t forget to complete the EAP Benefits Matrix attachment.
- C. The Court is interested in the cost to add a digital Well-Being Training. If this comes at an additional cost, please provide the add-on cost if this is not included in your core EAP services.
- D. A highly motivated service-oriented Account Team with a dedicated contact will be a key element to the Court. Please identify or describe your proposed Account Team and each Account Team member’s daily functions – please include support staff. Please provide location and the hours of operation and time zone for the Account Manager and Customer Service.
- E. Enrollment meetings / benefit fairs will be conducted at the various locations to educate the employees on their benefits. Please provide resources to accomplish this objective. If you require a minimum number of employees to attend, please provide your guideline – if a vendor change is made, we request the minimum be waived for the first open enrollment.
- F. Please include your financial ratings for: Standard & Poor’s, Moody’s Investors, and A.M. Best.
- G. The Court is requesting rate guarantee(s) for three (3) years, one for the initial term, one for an option to renew in the second year, and same for the third year. The option to extend the contract in year 2 and 3 is exercisable at the sole discretion of the Court.
- H. If your company can write more than one line of coverage, please provide pricing based upon a “packaged” as well as “unpackaged” basis. Please refer to the following websites for other benefit related RFPs: <https://caleprocure.ca.gov/pages/Events-BS3/event-search.aspx> and <http://www.sb-court.org/GeneralInfo/RequestforProposal.aspx>.
- I. What has your client retention percentage been over the last three years in California for your proposed products?
- J. Please include a performance guarantee based upon implementation, service standards, etc.
- K. Waive the binder check if required.

If you have not submitted a quote to the Court in the past, please note that the process is unique to the Court. The Court has stringent requirements in their formal RFP that must be followed to the letter for your bid to be accepted. Please read the Court RFP document that is included in the RFP very carefully. A Compliance representative must review and accept all the mandatory terms and conditions prior to signing off.

QUESTIONS ON RFP?

Please direct all questions pertaining to this RFP, Attachments, and Exhibits directly to the Court. Questions must be submitted via email to purchasing@sb-court.org and **must** include the RFP number. The Procurement Department will triage any questions to USI. Deadline for questions is **July 19, 2019, 3:00pm., PST** – *late questions will not be considered.* Answers are scheduled to be posted on July 23, 2019 (estimate).

RFP SUBMISSION GUIDELINES:

- ✓ Please send one hard copy and electronic copy via flash drive of your proposal to the Court based upon their instructions. It must be received by **TUESDAY, JULY 30, 2019, 3:00 P.M., PST.**
- ✓ In addition, please send a hard copy and an electronic copy via flash drive to Maria Mercado, Account Executive at:

***USI Insurance Services
21250 Hawthorne Blvd., Suite 600
Torrance, CA 90503
Tel: (424) 390-0000***

Please no elaborate printing or binding desired, rather focus on complete, clear, and concise content.

The due date has been set strategically in order to prepare the presentation to the Court's Employee Benefits Advisory Committee (EBAC) in August with the final recommendations going to the Judges in September for approval. Please note that carrier reference calls may be conducted on **August 20, 2019** and interviews may be conducted on **August 22, 2019, if necessary.**

This is a **blind bid** where you'll need to provide your last, best and final offer (BAFO). We do reserve the opportunity to negotiate with the finalists.

Sincerely,



Maria Mercado
Account Executive

Attachments

Cc: San Bernardino Superior Court
Gary Delaney and Christine Kwock: USI Team