



USI Insurance Services
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July 20, 2023

RE: Superior Court of California, County of San Bernardino
REQUEST FOR PROPOSAL (RFP) Employee Vision: RFP #23-02
Effective January 1, 2024

Due By: MONDAY, AUGUST 7, 2023, 1:15 P.M. PST - NO LATE PROPOSALS WILL BE ACCEPTED

We are conducting a vision marketing for our valued client, the Superior Court of California, County of San Bernardino (The Court). You are invited to submit a proposal for vision benefits with a January 1, 2024 effective date. Their zip code is 92415 and SIC code is 9211.

This RFP is composed of two set of 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 sets of** documents in their entirety.

COURT BACKGROUND

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

The Court currently has 80 judges and 15 subordinate judicial officers who hear court proceedings in 12 locations: Barstow, Colton, Fontana, Joshua Tree, Needles, Rancho Cucamonga, four (4) sites in San Bernardino and Victorville. There are **1,086 active employees** are listed on the census of the Court by providing administrative and clerical support.

CURRENT BENEFITS PROGRAM

The Court became a separate employer from the County of San Bernardino in 2001. The Court continued to participate in the County's health and welfare plans until August 1, 2011 when the Court contracted benefit plans for its employees. The current vision carrier is Eye Med.

We are asking for two quotes based upon the current employee classification, benefits structure, and rate structure:

1. Exempt Employees (Noted as "Non-Represented")
2. Represented Employees (Noted as "General")

CURRENT ENROLLMENT BY PLAN

	Exempt Employees	Represented Employees	Vision Waivers	Grand Total
EE only	30	470	61	561
EE + Spouse	22	213		235
EE+ Child(ren)	2	66		68
EE+ Family	36	186		222
Grand Total	90	935	61	1,086

PROPOSAL CONTENT (YOU WILL NEED TO ACCESS THESE DOCUMENTS FROM THE COURT'S WEBSITE):

<http://www.sb-court.org/GeneralInfo/RequestforProposal.aspx>

<https://caleprocure.ca.gov/pages/Events-BS3/event-search.aspx>

- ☐ Rate and Contribution Information
- ☐ Employee Census (to be provided by USI)
- ☐ Provider Disruption Report (to be provided by USI)
- ☐ EyeMed Claims Experience
- ☐ EyeMed Benefit Summaries
- ☐ Eye Med Coordination of Benefits Procedure
- ☐ Court Formal RFP with Attachments – ***MANDATORY!! PLEASE READ AND HAVE YOUR COMPLIANCE REVIEW THE COURT'S TERMS AND CONDITIONS. ALL MANDATORY TERMS AND CONDITIONS MUST BE ACCEPTED IN ORDER FOR YOUR PROPOSAL TO BE CONSIDERED.***

The Court's Proposal Requirements

- The Court uses an online eligibility system tied to its payroll to enroll employees; therefore, carrier feeds will need to be established on a weekly frequency. Please include an implementation timeline for this feature. Go "live" date will be November 22, 2023.
- Employees have 30 days from their employment date to enroll and 30 days from a qualifying event to notify Human Resources with proper documentation to enroll. The same timeframe applies to most mid-year status changes for employees and dependents except for loss of coverage under Medi-Cal or the state Children's Health Insurance Program, which allows 60 days from the loss of coverage.
- Rates to be presented in monthly frequency, contributions will be deducted on a bi-weekly (26 pay periods) basis.
- A highly motivated Account Team will be a key element to the Court. Please identify or describe and provide biographies of your proposed Account Team and each Account Team member's daily functions – please include support staff.
- Your quote should include the following:
 - Current level of benefits and detail all benefit deviations you propose.
 - Please indicate the name of the provider network that is being quoted to allow for provider searches on your website.
 - Please duplicate the coordination of benefits provision noted on the attachment.
 - The Court allows employees who are married to each other to cover each other and their dependent children on the plan.
 - Please provide GEO Access reports for the vision plans based upon all zip codes listed on the census (regardless of plan enrollment). The parameters should include two (2) vision providers within 10 miles. Please also include the zip codes that fall outside your service area and those that are not eligible for a particular plan.
 - Please provide your responses to the attached provider document to determine provider network disruption.
 - Please include your A.M. Best financial rating.
 - Commissions: 0%
- 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 vendor change is made, we request the minimum waived for the first open enrollment. This takes place in November.
- The successful bidder agrees to provide nine (9) raffle prizes for the Court's main locations for the Benefits Fair.
- The Court is requesting a rate guarantee for five years, one for the initial term and four one-year options to renew. The option for the second through fourth year is exercisable at the sole discretion of the Court.
 - Please include a performance guarantee based upon implementation, service standards, etc.

- What has your client retention percentage been over the last three years?
- Please provide quarterly vision content for the Court's newsletter to promote a vision topic based upon the prevalence in the Court's utilization patterns.
- If your company is awarded the business, it is expected that run-out claims through the end of the contract year will be provided when the contract ends or is terminated.
- Please waive binder check requirement

IMPORTANT: The Court has stringent requirements in their formal RFP that must be followed in order for your bid to be considered. Please read the Court RFP document that is posted on the procurement website very carefully. A Compliance representative of your company must review and accept all mandatory terms and conditions prior to signing off in order for your proposal to be accepted.

QUESTIONS ON RFP?

In compliance with the Court's RFP practices, DO NOT contact the USI team directly. All questions pertaining to this RFP, attachments, and exhibits should be submitted to scccsb.rfps@usi.com and **must** include the RFP title: **Vision Insurance Benefit Plans** and number: **RFP #23-02**. Deadline for questions is July 27, 2023, 1:15pm PST – late questions will not be accepted. Answers are scheduled to be posted on July 31, 2023 (estimated).

RFP SUBMISSION GUIDELINES:

Please send one hard copy of your proposal to USI Insurance Services (address below) via FedEx, UPS or hand deliver. It must be received by **MONDAY, AUGUST 7, 2023, by 1:15 P.M. PST.**

***USI Insurance Services Attn: SCCCSB RFP Team
21250 Hawthorne Blvd., Suite 380, Torrance, CA 90503
Tel: (424) 390-0000 (for delivery purposes only)***

- ✓ In addition, please provide USI with an electronic version of your proposal to scccsb.rfp@usi.com – the rate or fee information and benefits matrix should be in excel; all others should be in pdf format with live links. The bidder must include the RFP name: **Vision Plans** and number: **RFP #23-02** on the subject line of the email. *Please submit the email by 1:15pm PST on August 7, 2023.*
- ✓ You will be notified of the best and final offer (BAFO) opportunity on August 8, 2023, and it will be due on August 11, 2023 by 1:15pm PST.

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 29, 2023** and interviews may be conducted on **August 30, 2023, if necessary.**

This is a **blind bid** where submitted proposals are not shared in the market. You will have an opportunity to improve upon your proposal during the BAFO. We do reserve the opportunity to negotiate with the finalists.

Sincerely,

Pam Rodrigues, Account Manager

Enclosures

cc: San Bernardino Superior Court, Gary Delaney & Christine Kwock, USI Insurance Services