



USI Insurance Services
21250 Hawthorne Blvd
Suite 380
Torrance, CA 90503

July 19, 2022

RE: **Superior Court of California, County of San Bernardino**
REQUEST FOR PROPOSAL (RFP): Employee Assistance Program (EAP): RFP 22-04, Effective January 1, 2023
Due by: TUESDAY, AUGUST 2, 2022, 1:15 P.M., PT – 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, 2023 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.

The USI Team members assigned to the Court are Gary Delaney, Sr. Vice President, Christine Kwock, Sr. Account Executive and Pam Rodrigues, Account Manager.

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 69 judges and 16 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 1,225 employees covered on the EAP who service the needs of the Court by providing administrative and clerical support who are covered by the EAP. This number includes 69 judges and an additional 129 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 403 unique zip codes listed on the census. The parameters should include: 2 providers within 10 miles

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

- ACI Summary for Open Enrollment
- ACI Utilization Reports for 2021 and Q1 2022
- ACI Service Agreement
- EAP Census (Active, Inactive and Terminated Employee Zip Codes) *to be provided to Bidders by USI upon request*
- 2022 Benefit fair locations
- EAP RFP #22-04 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. 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.
- D. A hybrid approach will be used this year for enrollment meetings or benefit fairs and will be conducted at various locations to educate the employees on their benefits during their lunch hour. A representative from your company will be requested to attend. If you require a minimum number of employees to attend, please provide your guideline – if a carrier change is made, we request the minimum to be waived for the first open enrollment held this Fall. Please provide a microsite where employees and dependents will be able to see the Court offerings and download summaries and value-added resources.
- E. Please summarize the value-added benefits that are included in your proposal. State whether they are available in California only or also outside of California.
- 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.

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 THE 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: **Employee Assistance Program** and number: **RFP #22-04**. Deadline for questions is July 25, 2022, 1:15pm., PT – late questions will not be accepted. Answers are scheduled to be posted on July 26, 2022 (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 **TUESDAY, AUGUST 2, 2022, by 1:15 P.M., PT.**

**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.rfps@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: **Employee Assistance Program** and number: **RFP #22-04** on the subject line of the email. *Please submit the email by 1:15pm on August 2, 2022.*
- ✓ You will be notified of the best and final offer (BAFO) opportunity on August 3, 2022, and it will be due on August 5, 2022 by 1:15pm.

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 19, 2022** and interviews may be conducted on **August 22, 2022, 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

Attachments

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