

**RFP 18MISC3**  
**EMPLOYEE BENEFIT CONSULTING SERVICES**

**FACT SHEET**

A. **Overview:** This recommendation is to establish a contract with a qualified employee benefit consultant to assist Frederick County Public Schools (FCPS) in the management of its employee health and welfare programs. Bids were opened on October 20, 2017.

1. **Bid participation:**

40 proposals downloaded  
6 companies submitted a bid

2. **Bids were received from:**

Aon Consulting, Inc., (Baltimore, MD)  
Bolton Partners, Inc., (Baltimore, MD)  
GRS & Co Health and Welfare Consulting, LLC, (Southfield, MI)  
Lockton Companies, Inc., (Washington, DC)  
The Segal Group, Inc., (Washington, DC)  
**Trion Group, Marsh & McLennan Agency, (King of Prussia, PA)**

3. **Other Facts:**

- The contract term will be effective from date of award through October 31, 2022, with three additional one-year renewal options available.
- The consultant will provide:
  1. Full service consulting which includes analytical and strategic consulting services on an ongoing basis for FCPS's group health and welfare benefit plans.
  2. A comprehensive approach in reviewing plan utilization with the use of data warehousing and special underwriting programs to help develop a multi-year strategy in assisting FCPS in making informed decisions.
  3. Resources to assist with developing employee communications, summary plan booklets and Brainshark to educate and engage employees.
- This recommendation has been reviewed and approved by the Insurance Council which consists of members from FCPS, Frederick County Teachers Association (FCTA), Frederick Association of School Support Employees (FASSE) and Frederick County Administrative and Supervisory Association (FCASA).
- Selection is based on the total score of each vendor's technical and cost proposal.
- The contract will be administered by Penny Opalka, Senior Manager, Human Resources.

4. **Source of Funding:** Funding for the recommended Employee Benefit Consulting Services is through the Board's self-insurance fund, which will continue to be funded by the Board of Education and employee/retiree contributions.

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B. **Recommendation:** Staff recommends that RFP 18MISC3, Employee Benefit Consulting Services, be awarded to Trion Group, King of Prussia, PA, per the attached Scoring Summary at an estimated annual cost of \$187,000. If additional work beyond the original bid scope of work is needed, the hourly rates will apply.

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C. **Action taken by the Board (Purchasing use only):**

\_\_\_\_\_ Approved      \_\_\_\_\_ Denied      \_\_\_\_\_ Deferred      \_\_\_\_\_ Other      KM/jc  
\_\_\_\_\_ Date            \_\_\_\_\_ Date            \_\_\_\_\_ Date            \_\_\_\_\_ Date      BOE Meeting: 11.29.17

**RFP 18MISC3, EMPLOYEE BENEFIT CONSULTING SERVICES**  
**SCORING SUMMARY**

	<b>Technical Score 80 Points Max</b>	<b>Fee Score 20 Points Max</b>	<b>Total Score</b>
Segal Consulting	78	0	78
<b>Trion</b>	<b>80</b>	<b>17</b>	<b>97</b>
Bolton Partners	74	20	94
AON Hewitt	73	12	85
Lockton	59		
GRS	57		

<b>Hourly Labor Rates:</b>	<b>Trion</b>	<b>Segal</b>	<b>AON</b>	<b>Bolton</b>
Sr. Vice President	\$ 300.00	\$ 425.00	\$ 390.00	\$ 400.00
Sr. Consultant	\$ 300.00	\$ 425.00	\$ 360.00	\$ 320.00
Consultant	\$ 250.00	\$ 350.00	\$ 265.00	\$ 280.00
Sr. Analyst	\$ 200.00	\$ 265.00	\$ 225.00	\$ 170.00
Analyst	\$ 150.00	\$ 200.00	\$ 180.00	\$ 145.00
Administration	\$ 100.00	0.00	\$ 90.00	\$ 90.00
<b>Average Hourly Rate</b>	<b>\$ 216.67</b>	<b>\$ 277.50</b>	<b>\$ 251.67</b>	<b>\$ 234.17</b>
<b>Annual Estimated Fee:</b>	\$ 187,000.00	\$ 89,000.00	\$ 203,500.00	\$ 108,500.00

**Notes:**

1. The annual estimated fee received from Segal was incomplete.
2. The annual estimated fee received from Trion provided a guaranteed savings of equal to or greater than their annual fee each year putting 100% of their fees at risk in an ROI for FCPS.