



**WILL COUNTY, ILLINOIS**

**PURCHASING DEPARTMENT**

**JENNIFER BERTINO-TARRANT**  
WILL COUNTY EXECUTIVE

**KEVIN LYNN**  
DIRECTOR

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County Office Building  
302 N. Chicago Street  
Joliet, IL 60432

January 30, 2023

To Whom It May Concern:

You are invited to submit your Qualifications for Brokerage Services for Health, Dental, Vision and related Insurance Benefits Plans for Will County, Illinois.

Responses to this solicitation will be received by the Purchasing Department, 2nd floor, Will County Office Building, 302 N. Chicago Street, Joliet, IL, 60432, **NOT LATER THAN 4:00 PM, Tuesday February 14, 2023.**

Responses to this Request for Qualifications (RFQ) will be reviewed by the Will County Executive or her representative who reserves the right to accept or reject any or all responses received as a result of this solicitation.

Should you have any questions regarding this RFQ, please submit them in writing to Kevin Lynn, Purchasing Director, at [klynn@willcountyillinois.com](mailto:klynn@willcountyillinois.com). Questions regarding this RFQ must be submitted by 4:00 PM, Tuesday February 7, 2023.

We welcome your response.

Sincerely,

*Kevin Lynn*

**REQUEST FOR QUALIFICATIONS (RFQ) FOR BROKERAGE SERVICES FOR HEALTH, DENTAL, VISION AND RELATED INSURANCE BENEFITS PLANS.**

RESPONSES TO THIS REQUEST FOR QUALIFICATIONS (RFQ) FOR HEALTH, DENTAL, VISION AND RELATED INSURANCE BENEFITS PLANS, WILL BE RECEIVED AT THE PURCHASING DEPARTMENT, 2ND FLOOR OF THE WILL COUNTY OFFICE BUILDING, 302 N. CHICAGO ST. JOLIET, IL 60432, UNTIL THE HOUR OF 4:00 PM, ON FEBRUARY 14, 2023.

RESPONSES TO THIS RFQ WILL BE REVIEWED BY THE COUNTY EXECUTIVE OR HER REPRESENTATIVE TEAM WHO RESERVES THE RIGHT TO ACCEPT OR REJECT ANY OR ALL RESPONSES RECEIVED AS A RESULT OF THIS SOLICITATION.

THIS RFQ IS AVAILABLE IN ELECTRONIC FORMAT AT [www.willcountyillinois.com](http://www.willcountyillinois.com), AND [www.demandstar.com](http://www.demandstar.com), AS WELL AS THE PURCHASING DEPARTMENT, 2ND FLOOR, WILL COUNTY OFFICE BUILDING, 302 N. CHICAGO ST., JOLIET, IL 60432, (815) 740-4712 OR BY EMAIL [purchasing@willcountyillinois.com](mailto:purchasing@willcountyillinois.com).

RESPONSES TO THIS RFQ SHALL BE CONSTRUED AS ACCEPTANCE OF THE TERMS AND CONDITIONS INCLUDED WITHIN THIS SOLICITATION. THE COUNTY OF WILL RESERVES THE RIGHT TO ACCEPT OR REJECT ANY OR ALL RESPONSES RECEIVED AS A RESULT OF THIS SOLICITATION.

BY ORDER OF THE WILL COUNTY EXECUTIVE, JENNIFER BERTINO-TARRANT.

**INSTRUCTIONS TO VENDORS**  
**PROFESSIONAL BROKERAGE SERVICES**  
**WILL COUNTY, JOLIET, IL.**

**GENERAL SPECIFICATIONS:**

Vendors are invited to submit sealed Qualifications for Professional Brokerage Services for the County of Will, Joliet, IL. The contract period shall begin on or after **May 1, 2023, For the 2024 plan year.**

**QUALIFICATIONS:**

Sealed Qualifications will be received in the Purchasing Department, 2nd floor, Will County Office Building, 302 N. Chicago St., Joliet, IL 60432, **not later than 4:00 PM February 14, 2023 “as so indicated by the time stamp clock of Will County”.** **QUALIFICATIONS RECEIVED AFTER THIS TIME WILL NOT BE ACCEPTED.**

Sealed Qualifications must be made in accordance with the instructions contained herein. All Forms shall be completely filled out and shall not be detached from this binding. The complete set of Contract Documents shall be submitted with this Qualifications. All Qualifications Forms and Specifications as attached hereto shall be used to form and shall be incorporated into the Contract for the work to be performed.

Qualifications shall be submitted on the forms furnished by the County of Will in a sealed package marked with the vendor's name and address and the notation:

**SEALED QUALIFICATIONS:**

**BROKERAGE SERVICES FOR HEALTH, DENTAL, VISION, AND RELATED INSURANCE PROGRAMS.**

**QUALIFICATIONS DUE: February 14, 2023, 4:00 PM**

Qualifications shall be addressed to the Will County Purchasing Department, Will County Office Building, 302 N. Chicago St., Joliet, IL 60432.

**SIGNATURE OF QUALIFICATIONS:**

The County of Will expects the signature on Qualifications documents to be that of an authorized representative of said Company. An officer or agent of the offering bidder who is empowered to bind the vendor in a Contract shall sign the Qualifications and any clarifications to that Qualifications.

Each vendor, by making their Qualifications, represents that they have read and understand the documents. **Any Qualifications not containing said signed documents shall be non-conforming and shall be rejected.**

**PROCEDURES:**

1. All Qualifications must be prepared on the forms provided by the County of Will and one (1) original, five (5) copies and one (1) electronic copy on an electronic storage device submitted in accordance with the Instructions to Vendors.

2. A Qualifications is invalid if it has not been deposited at the designated location prior to the time and date for receipt of Qualifications indicated in the Advertisement for Qualifications or prior to any extension thereof issued to the vendors.
3. Unless otherwise provided in any supplement to the Instructions to Vendors, no vendor shall modify, withdraw or cancel their Qualifications or any part thereof for ninety (90) days after the time designated for the receipt of Qualifications in the Advertisement for Qualifications.
4. Changes or corrections may be made in the Qualifications documents after they have been issued and before Qualifications are received. In such cases, a written addendum describing the change or correction will be issued by the County of Will to all vendors recorded by the County of Will as having received the Qualifications documents and will be available for inspection wherever issued. Such addendum shall take precedence over that portion of the documents concerned and shall become part of the Qualifications documents. Except in unusual cases, addenda will be issued to reach the vendors at least five (5) days prior to date established for receipt of Qualifications.
5. Each vendor shall carefully examine all Qualifications documents and all addenda thereto and shall thoroughly familiarize themselves with the detailed requirements thereof prior to submitting a Qualifications. Should a vendor find discrepancies or ambiguities in, or omissions from, documents, or should they be in doubt as to their meaning, they shall, at once, and in any event not later than seven (7) days prior to Qualifications due date, notify the County of Will, which will, if necessary, send written addenda to all vendors. The County of Will is not responsible for any oral instructions. All inquiries shall be directed to Kevin Lynn, [klynn@willcountyillinois.com](mailto:klynn@willcountyillinois.com). After Qualifications are received, the vendor will make no allowance for oversight.

**REJECTION OF QUALIFICATIONS:**

The vendor acknowledges the right of the County of Will to reject any or all Qualifications, to waive any nonmaterial informality or irregularity in any Qualifications received, and to accept the Qualifications deemed most favorable to the interest of the County of Will after all Qualifications have been examined and evaluated. In addition, the vendor recognizes the right of the County of Will to reject a Qualifications if the Qualifications is in any way incomplete or irregular.

**CONTRACT DURATION:**

The contract period shall begin on or after May 1, 2023 for the 2024 plan year.

**PRIME CONTRACTOR CERTIFICATION:**

Included in this Qualifications package is a prime contractor certification form. This form **must** be filled out and returned with your Qualifications package or your Qualifications will not be considered.

**WORDS AND FIGURES:**

Where amounts are given in both words and figures, the words shall govern. If the amount is not written in words, the unit cost will take precedence over the extended price in case of a discrepancy in the multiplication.

**NON-DISCRIMINATION:**

The Contractor shall at all times observe and comply with any law, statute, regulation or the like relating in any way to civil rights, including but not limited to the Public Works Employment Discrimination Act, 775 ILCS 10/0.01 et seq.

**DEFAULT:**

In case of default by the successful vendor, the County of Will may procure the articles or services from other sources and may deduct from the unpaid balance due to the successful vendor any of its costs resulting from the default. In the alternative, the County may collect against the bond or surety for excess costs so paid, and the prices paid by the County of Will shall be considered the prevailing market price at the time such purchase is made.

**HOLD HARMLESS CLAUSE:**

The vendor will save and hold harmless the County of Will from and against all liabilities, claims and demands of whatsoever kind or nature arising out of or connected with the performance of services by the vendor, or on behalf of the County of Will, whether such injury, death, loss, or damage shall have been occasioned by the negligence of the vendor, or a Subcontractor of the vendor, or their employees; or otherwise. The vendor will defend at its own expense any actions based thereon and shall pay all charges of attorneys and all costs and other expenses arising there from. All obligations arising from this clause shall survive termination of the Agreement resulting from award of this Qualifications.

**TAX EXEMPTION:**

The County of Will is exempt from Federal, State, and Municipal Taxes.

**ILLINOIS FREEDOM OF INFORMATION ACT:**

Any and all submissions to the County of Will become the property of the County of Will and these and any late submissions will not be returned. Your Qualifications will be open to the public under the Illinois Freedom of Information Act (FOIA) (5 ILCS 140) and other applicable laws and rules, unless you request in your Qualifications that we treat certain information as exempt. We will not honor requests to exempt entire Qualifications. You must show the specific grounds in FOIA or other law or rule that support exempt treatment. If you request exempt treatment, you must submit an additional copy of the Qualifications with exempt information deleted. This copy must tell the general nature of the material removed and shall retain as much of the Qualifications as possible. In the event the County of Will receives a request for a document submitted, the County of Will shall provide notice to contractor as soon as practicable. Regardless, contractor will be responsible for any costs or damages associated with defending your request for exempt treatment. Furthermore, contractor warrants that County of Will's responses to requests for a document submitted that is not requested to be exempt will not violate the rights of any third party.

Please be advised that if your Qualifications is accepted by the County of Will all related records maintained by, provided to, or required to be provided to the County of Will during the contract duration are subject to FOIA. In the event the County of Will receives a request for a document relating to contractor, its provision of services, or the arranging for the provision of services, the County of Will shall provide notice to contractor as soon as practicable and, within the period available under FOIA, contractor may then identify those records, or portions thereof, that it in good faith believes to be exempt from production and the justification for such exemption. Regardless, contractor will be responsible for any costs or damages associated with defending the request for

exempt treatment. Furthermore, contractor will warrant that County of Will's responses to requests for a document relating to contractor, its provision of services, or the arranging for the provision of services, will not violate the rights of any third party.

Please also be advised that FOIA provides that any record in the possession of a party with whom the County of Will has contracted to perform a governmental function on behalf of the County of Will, and that directly relates to the governmental function and is not otherwise exempt under FOIA is considered a public record of the County of Will for purposes of FOIA 5 ILCS 140/7(2). As such, upon request by the County of Will (or any of its officers, agents, employees, or officials), the contractor shall provide to the County of Will at no cost and within the timeframes of FOIA a copy of any "public record" as required by FOIA and in compliance with the provisions of FOIA. After request by the County of Will, contractor may then identify those records, or portions thereof, that it in good faith believes to be exempt from production and the justification for such exemption. Regardless, contractor will be responsible for any costs or damages associated with defending the request for exempt treatment.

#### **AWARDING OF QUALIFICATIONS:**

The vendor acknowledges the right of the County of Will to reject any Qualifications not in compliance with the request for Qualifications and the right to reject all Qualifications and the right to waive any non-material informalities or irregularities for any Qualifications received and to accept the lowest responsible, responsive Qualifications after all Qualifications have been examined and evaluated.

**The Request for Qualifications is expected to be awarded at the April 20, 2023 Will County Board meeting.**

#### **TERMINATION:**

Either party hereto may, at any time during the term hereof, terminate the contract, with or without cause, upon ninety (90) days written notice to the other party of such termination. At the end of said ninety (90) days' notice period, the contract shall be terminated.

Immediately upon the termination of the contract for any reason, all debts, obligations, and liabilities theretofore accrued between the vendor and the County of Will, will be paid, performed, and discharged except for the provisions of the Hold Harmless Clause which shall survive any termination of the Agreement resulting from the award of this Qualifications.

#### **COMPLIANCE WITH APPLICABLE LAW:**

In all aspects relative to the performance of their respective obligations under this contract, the vendor and the County of Will shall conduct their respective businesses in accordance with all applicable federal, state, and local laws.

#### **INSURANCE REQUIREMENTS FOR INFORMATION TECHNOLOGY**

Vendor/Consultant shall procure and maintain for the duration of the contract insurance against claims for security breaches, system failures, injuries to persons, damages to software or damages to property (including computer equipment) which may arise from or in connection with the performance of the work hereunder by the Vendor/Consultant, its agents, representatives, or employees. Vendor/Consultant shall procure and maintain for the duration of the contract insurance claims arising out of their professional services and including,

but not limited to loss, damage, theft or other misuse of data, infringement of intellectual property, invasion of privacy and breach of data.

## **MINIMUM SCOPE AND LIMIT OF INSURANCE**

Vendor Coverage shall be at least as broad as:

1. Commercial General Liability (CGL): Insurance Services Office Form CG 00 01 covering CGL on an “occurrence” basis, including products and completed operations, property damage, bodily injury and personal & advertising injury with limits no less than \$1,000,000 per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location (ISO CG 25 03 or 25 04) or the general aggregate limit shall be twice the required occurrence limit.

2. Automobile Liability: Insurance Services Office Form CA 0001 covering, Code 1 (any auto), or if Consultant has no owned autos, Code 8 (hired) and 9 (non-owned), with limit no less than \$1,000,000 per accident for bodily injury and property damage.

3. Workers’ Compensation insurance as required by the State of Illinois, with Statutory Limits, and Employer’s Liability Insurance with limit of no less than \$1,000,000 per accident for bodily injury or disease. (Not required if consultant provides written verification, it has no employees).

4. Cyber Liability Insurance, with limits not less than \$2,000,000 per occurrence or claim, \$2,000,000 aggregate. Coverage shall be sufficiently broad to respond to the duties and obligations as is undertaken by Vendor/Consultant in this agreement and shall include, but not be limited to, claims involving security breach, system failure, data recovery, business interruption, cyber extortion, social engineering, infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, and alteration of electronic information. The policy shall provide coverage for breach response costs as well as regulatory fines and penalties as well as credit monitoring expenses.

5. Technology Professional Liability Errors & Omissions Insurance appropriate to the Vendor/Consultant’s profession and work hereunder, with limits not less than \$2,000,000 per occurrence. Coverage shall be sufficiently broad to respond to the duties and obligations as is undertaken by the Vendor/Consultant in this agreement and shall include, but not be limited to claims involving security breach, system failure, data recover, business interruption, cyber extortion, social engineering, infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, and alteration of electronic information. The policy shall provide coverage for breach response costs, regulatory fines, and penalties as well as credit monitoring expenses.

a The policy shall include, or be endorsed, to include property damage liability coverage for damage to, alteration of, loss of, or destruction of electronic data and/or information “property” of the County in the care, custody, or control of the Vendor/Consultant.

b. If not covered under the Vendor/Consultant’s liability policy, such “property” coverage of the County may be endorsed onto the Vendor’s Cyber Liability Policy as covered property as follows:

If the Vendor/Consultant maintains broader coverage and/or higher limits than the minimums shown above, the County requires and shall be entitled to the broader coverage and/or higher limits maintained by the Vendor/Consultant. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the County.

### **Other Insurance Provisions**

The insurance policies are to contain, or be endorsed to contain, the following provisions:

#### **Additional Insured Status**

The County, its officers, officials, employees, and volunteers are to be covered as additional insureds on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of the Vendor/Consultant including materials, parts, or equipment furnished in connection with such work or operations. General Liability coverage can be provided in the form of an endorsement to the Vendor/Consultant's insurance (at least as broad as ISO Form CG 20 10 11 85 or both CG 20 10, CG 20 26, CG 20 33, or CG 20 38; and CG 20 37 forms if later revisions used).

#### **Primary Coverage**

For any claims related to this contract, the Vendor/Consultant's insurance coverage shall be primary and noncontributory. Coverage for commercial liability shall be at least as broad as ISO CG 20 01 04 13 as respects the County, its officers, officials, employees, and volunteers. Any insurance or self-insurance maintained by the County, its officers, officials, employees, or volunteers shall be excess of the Vendor/Consultant's insurance and shall not contribute with it.

#### **Notice of Cancellation**

Each insurance policy required above shall state that coverage shall not be canceled, except with a minimum of 7 days prior notice to the County.

#### **Waiver of Subrogation**

Vendor/Consultant hereby grants to County a waiver of any right to subrogation which any insurer of said Vendor/Consultant may acquire against the County by virtue of the payment of any loss under such insurance. Vendor/Consultant agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether the County has received a waiver of subrogation endorsement from the insurer.

#### **Self-Insured Retentions**

Self-insured retentions must be declared to and approved by the County. The County may require the Vendor/Consultant to purchase coverage with a lower retention or provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention. The policy language shall provide, or be endorsed to provide, that the self-insured retention may be satisfied by either the named insured or County. The CGL and any policies, including Excess liability policies, may not be subject to a self-insured retention (SIR) or deductible that exceeds \$25,000 unless approved in writing by the County. Any and all deductibles and SIRs shall be the sole responsibility of Vendor/Consultant or subcontractor who procured such insurance and shall not apply to the Indemnified Additional Insured Parties. The County may deduct from any amounts otherwise due Vendor/Consultant to fund the SIR/deductible. Policies shall NOT contain any self-insured retention (SIR) provision that limits the satisfaction of the SIR to the Named Insured. The policy must



also provide that Defense costs, including the Allocated Loss Adjustment Expenses, will satisfy the SIR or deductible. County reserves the right to obtain a copy of any policies and endorsements for verification.

### **Acceptability of Insurers**

Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A: VII, unless otherwise acceptable to the County.

### **Claims Made Policies**

If any of the required policies provide coverage on a claims-made basis:

1. The Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work.
2. Insurance must be maintained, and evidence of insurance must be provided for at least five (5) years after completion of the contract work.
3. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date, the Consultant must purchase "extended reporting" coverage for a minimum of five (5) years after the completion of contract work.

### **Verification of Coverage**

Vendor/Consultant shall furnish the County with original certificates and amendatory endorsements, or copies of the applicable policy language effecting coverage required by this clause and a copy of the Declarations and Endorsements Pages of the CGL and any excess policies listing all policy endorsements. All certificates and endorsements and copies of the Declarations & Endorsements pages are to be received and approved by the County before work commences. However, failure to obtain the required documents prior to work beginning shall not waive the Vendor/Consultant's obligation to provide them. The County reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time. The County reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstance.

### **Subcontractors**

Vendor/Consultant shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein, and Vendor/Consultant shall ensure that County is an additional insured on insurance required from subcontractors.

### **Special Risk or Circumstances**

County reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

## **QUALIFICATIONS**

Vendor must have a written information security program in place.

- Vendor may receive or have access to private or confidential information, which is not and shall not be owned by the vendor. Vendor shall not sell or otherwise misuse private or confidential information and shall maintain safeguards to protect that information.
- All information collected, compiled, or maintained as a result of any agreement that might be entered into shall be the property of the County. Within 30 days of the termination of any such agreement, Vendor shall return all data in usable format, including but not limited to tables, indexes, number of documents and irrespective of any other open items and payment obligations.
- Vendor must notify County in the event of any breach of data, whether or not data is lost.
- Data must be backed up in a secure fashion and County shall have access to backups.
- Must comply with minimum security requirements under Illinois law.

## **SUBMITTAL REQUIREMENTS:**

Each of the following items shall be submitted by the time mentioned herein in order that the Qualifications will be considered:

1. **Signed** Copy of Prime Contractor Certification
2. **Signed** Addenda Form
3. **Signed** RFQ Form

**Background:**

Will County is located within the northern part of Illinois and is one of the fastest-growing counties in the United States, with a population of nearly 700,000. The county seat of Will County is Joliet.

As a result of Will County's unique location within the Chicago metropolitan area, residents can enjoy the best of the city's cultural attractions combined with the community focus of suburban life and miles of countryside dotted with farms, picturesque towns and Counties, historic homes, forest preserves and nature trails. At the same time, as one of the fastest growing counties in the US and home to one of the densest concentrations of intermodal transportation facilities in the country, Will County offers a series of unparalleled economic opportunities to its residents.

Modernization of Will County's infrastructure to serve the needs of a complex and growing economy has been matched by a process of innovation and modernization on the part of county government. As they explore the county's new website, residents will encounter many examples of improvements designed to give them better access to information, applications and forms, internship and volunteer opportunities and the large variety of services offered by their county government. Will County administers a variety of funds for programs and services aimed at supporting the County's residents. Will County received \$134 million from U.S. Department of the Treasury under the Coronavirus State and Local Fiscal Recovery Funds (SLFRF) program.

**Objective:**

The County of Will looks to continue to provide the highest quality medical, dental, vision and related insurance programs at the best value while balancing the needs of the County and the needs of the recipients of these benefits.

The County of Will seeks a Broker of Record and designated Benefits Consultant to provide professional services to Will County and act on behalf of Will County for its comprehensive group benefits plan. The County of Will is Requesting Qualifications and Performance Data from firms with substantial experience in servicing employee benefit plans for Counties and/or Municipalities. Statement of Interest and Performance Data information relative to this Request for Qualifications should be addressed to: Denise Maiolo, Director of Human Resources.

**The County of Will IS NOT asking for, nor authorizing you, to solicit quotes from insurance carriers.**

The County's insurance plans that may be included under this brokerage arrangement include, but are not limited to:

- Health
- Prescription Drug
- Dental
- Vision
- Basic Life and AD&D
- Voluntary Life
- Voluntary AD&D
- Employee Assistance Program
- Employee Benefits Portal
- HDHP (High Deductible Health Plan) – HSA (Health Savings Account)
- Wellness Program

All submission materials become the property of the County and may be returned only at its option. The County is not obligated to accept any Qualifications or to negotiate with any candidate. All transactions are subject to the final approval of the County who reserves the right to reject any or all Qualifications without cause for liability.

**Employee and Retiree Population:**

The County's workforce consists of approximately **2,225** employees, most of whom are represented within one of **16** separate collective bargaining units. The County currently affords insurance to its full-time employees, part-time eligible employees, and retirees.

The County provides a full spectrum of employee benefits. The employee benefits are self-insured, offering the same health insurance coverage to all full-time employees through BCBS of IL, BCBS Dental, Davis Vision, BCBS/Dearborn Life Insurance, LifeWorks EAP, HDHP-HSA, Alight Employee Benefits Portal.

The County provides to its retirees the HMO and PPO health plan options as well Vision, Dental coverage as the active employees. Currently, the County has approximately **380** retirees under age 65 ranging between the BCBS of IL plans.

**Please note that the insurance plans are based on a January 1st through December 31<sup>st</sup> (calendar) plan year.**

**Please note also that the Wellness Campaign (Will Be Well) is currently based on an annual basis, April 1 – March 15<sup>th</sup>. While participation in the Wellness program is voluntary, employees and eligible spouses covered under the county's comprehensive group health insurance plan must complete certain requirements annually in order to avoid paying a \$125 per month premium surcharge. The surcharge takes effect on July 1 and runs through the following June 30<sup>th</sup>.**

**Minimum required qualifications:**

The County is seeking a proven and experienced broker/consultant, preferably with multi-line pricing options and preferably with prior experience with a county similar in size and character to Will County to perform the full range of services related to the design, implementation, maintenance, communication, compliance and improvement of its health, dental, vision, Life and related life insurance plans. Please provide a minimum of five (5) client references. Specific responsibilities include, but are not limited to:

**Program Design and Marketing**

- Identify, analyze alternative quality and cost-efficient benefit strategies and plans and provide recommendations on same.
- Assist in the development of long-range goals and strategies for the employee benefit program.
- Assist in developing and/or purchasing of website technologies to support employee portal/ on-line enrollments, changes, and employee education. (Please note that the County has a current website portal through Alight and would like to replicate and/or enhance its features.)
- Assist in design of alternative health plans, and/or strategies, to provide cost containment/savings to the County while retaining quality options for employees.

- Assist with any government and/or IRS filing as needed in connection with the annual renewal process and/or implementation of existing or new services, as necessary.
- Create and implement a seamless transition plan.
- Offer options and recommendations on program design.
- Interview, assess and recommend potential vendors.
- Prepare Request for Qualifications, submit to carriers and follow up.
- Provide analysis of marketing efforts.
- Assist with placement of coverage with selected vendors.
- Assist the County in the development and maintenance of a Wellness Program. **The County desires to align the Wellness Campaign to the calendar plan year.**

## **Financial Analysis**

- Track participation and costs by month and by coverage.
- Compare annual claim utilization to prior years as well as industry standard.
- Provide quarterly financial reports that separate costs versus budget.
- Annually summarize key medical utilization statistics in conjunction with the strategic planning process for subsequent years.
- Analyze, review, and negotiate renewals with insurance carriers.
- After close of the plan year, present a full historical analysis of costs and utilization from previous years.
- Project cash flow impact of funding alternatives and plan design options.
- Review and summarize annual demographic changes. Review demographics after each open enrollment and identify likely cost impact.
- Assist with and participate in annual open enrollment activities.
- Analyze and compare employee contributions to normative data.
- Assist in developing contribution strategy for the future.
- Provide financial exhibits for union negotiations such as comparisons with other counties, 5-year cost projections of existing plan as well as potential plan changes, etc.
- Adhere to and provide verification of all compliance requirements including Creditable Coverage and PCORI fee calculations.

## **Account Management**

- Provide on-going, continual day-to-day account management services to a defined service level agreement.
- Assist with claim and/or eligibility issues, including assigning personnel to assist with employee-specific claim disputes.
- Prepare, plan and provide resources, cost-modeling, recommendations and training for County HR Leadership, as needed, or as directed.
- Prepare, plan, provide and review documents such as SPDs, plan documents, benefit highlight sheets and vendor contracts.
- Act as a liaison between the County and its vendors.
- Prepare, plan and provide coverage summaries including key contacts for each benefit, rate summaries and benefit program highlights.

- Arrange meetings with vendors, whether it is for the vendor to come to our office to work out problems, or for us to tour their facilities to meet customer service team dealing with our employees, provide better understanding of how they service our employees, learn of new programs or options available with that vendor, etc.
- Work as an extension of the County thereby eliminating the need for additional staffing.

**Timeline:**

<b>Date</b>	<b>Phase</b>
January 30, 2023	RFQ Release
February 14, 2023	Submissions Due
February 15-22, 2023	Minimum requirements - Evaluation
Week of March 6, 2023	Demo
March 13-14, 2023	Scoring
March 15, 2023	Finalize Selection
April 20, 2023	County Board Approval
On/around May 1, 2023	Implementation

**PRIME CONTRACTOR CERTIFICATION:**

The undersigned hereby certifies that \_\_\_\_\_  
Company Name

is not barred from contracting with any unit of State or local government as a result of a violation of either Section 33E-3 or 33E-4 of the Criminal Code of 1961.

\_\_\_\_\_  
Name of Bidder Title \_\_\_\_\_  
\_\_\_\_\_

Signature Date

Note: A person who makes a false certificate commits a Class 3 Felony.

Sections 33E-3 and 33E-4 provide as follows:

**33E-3. Bid-rigging.** A person commits the offense of bid-rigging when he knowingly agrees with any person who is, or but for such agreement would be, a competitor of such person concerning any bid submitted or not submitted by such person or another to a unit of State or local government when with the intent that the bid submitted or not submitted will result in the award of a Contract to such person or another and he either (1) provides such person or receives from another information concerning the price or other material term or terms of the bid which would otherwise not be disclosed to a competitor in an independent non-collusive submission of bids or (2) submits a bid that is of such a price or other material term or terms that he does not intend the bid to be accepted. Bid-rigging is a Class 3 felony. Any person convicted of this offense or any similar offense of any state or the United States which contains the same elements as this offense shall be barred for 5 years from the date of conviction from Contracting with any unit of State or local government. No corporation shall be barred from Contracting with any unit of State or local government as a result of a conviction under this Section of any employee or agent of such corporation if the employee so convicted is no longer employed by the corporation and: (1) it has been finally adjudicated not guilty or (2) if it demonstrates to the governmental entity with which it seeks to Contract and that entity finds that the commission of the offense was neither authorized, requested, commanded, nor performed by a director, officer or a high managerial agent in behalf of the corporation as provided in paragraph (2) of subsection (a) of Section 5-4 of this Code.

**33E-4 Bid rotating.** A person commits the offense of bid rotating when, pursuant to any collusive scheme or agreement with another, he engages in a pattern over time (which, for the purposes of this Section, shall include at least 3 Contract bids within a period of 10 years, the most recent of which occurs after the effective date of this amendatory Act of 1988) of submitting sealed bids to units of State or local government with the intent that the award of such bids rotates, or is distributed among, persons or business entities which submit bids on a substantial number of the same Contracts. Bid rotating is a Class 2 felony. Any person convicted of this offense or any similar offense of any state or the United States which contains the same elements as this offense shall be permanently barred from Contracting with any unit of State or local government. No corporation shall be barred from Contracting with any unit of State or local government as a result of a conviction under this Section of any employee or agent of such corporation if the employee so convicted is no longer employed by the corporation and: (1) it has been finally adjudicated not guilty or (2) if it demonstrates to the governmental entity with which it seeks to Contract and that entity finds that the commission of the offense was neither authorized, requested, commanded, nor performed by a director, officer or a high managerial agent in behalf of the corporation as provided in paragraph (2) of subsection (a) of Section 5-4 of this Code.

Possible violations of Section 33 can be reported to the Office of the Will County State's Attorney at (815) 7278453.

COMPANY NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

SOC. SEC # or FEIN: \_\_\_\_\_

CONTACT: \_\_\_\_\_

PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

EMAIL: \_\_\_\_\_

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Agency Name and Delivery Address:	WILL COUNTY 302 N. CHICAGO STREET, JOLIET, IL 60432
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For Additional information contact:	KEVIN LYNN PURCHASING DIRECTOR, <a href="mailto:klynn@willcountyillinois.com">klynn@willcountyillinois.com</a>
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Signed by: \_\_\_\_\_ Title: \_\_\_\_\_

Authorized Representative of Company  
**Authorized Representative of Company**



COMPANY NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

SOC. SEC. or F.E.I.N. # \_\_\_\_\_

CONTACT \_\_\_\_\_

PHONE \_\_\_\_\_ FAX \_\_\_\_\_ EMAIL \_\_\_\_\_

=====

ADDENDUM RECEIPT: Receipt of the following Addendum to the Bidding Documents is hereby acknowledged:

No.\_\_\_\_, dated\_\_\_\_, signed\_\_\_\_\_

=====

ADDENDUM RECEIPT: Receipt of the following Addendum to the Bidding Documents is hereby acknowledged:

No.\_\_\_\_, dated\_\_\_\_, signed\_\_\_\_\_

=====

ADDENDUM RECEIPT: Receipt of the following Addendum to the Bidding Documents is hereby acknowledged:

No.\_\_\_\_, dated\_\_\_\_, signed\_\_\_\_\_

=====

**LATE QUALIFICATIONS WILL NOT BE ACCEPTED**

<b><u>SEALED BID DOCUMENT</u></b>	
<b><u>Vendor Return Address:</u></b>	
<b><u>RFQ #:</u></b>	<b>2023-50B BROKERAGE SERVICE RFQ</b>
<b><u>DESCRIPTION:</u></b>	<b>BROKERAGE SERVICES FOR HEALTH, DENTAL, VISION AND RELATED INSURANCE PLANS</b>
<b><u>DUE DATE:</u></b>	<b>2-14-23, 10:00 AM</b>
<b>DATED MATERIAL-DELIVER IMMEDIATELY</b>	
<b>WILL COUNTY PURCHASING DEPARTMENT 302 N. CHICAGO ST., 2<sup>ND</sup> FLOOR JOLIET, IL 60432</b>	

PLEASE CUT OUT AND AFFIX THIS QUALIFICATIONS LABEL (ABOVE) TO THE OUTERMOST PACKAGE OF YOUR SEALED QUALIFICATIONS TO HELP ENSURE PROPER DELIVERY!

**LATE QUALIFICATIONS WILL NOT BE ACCEPTED**



# WILL COUNTY, ILLINOIS

PURCHASING DEPARTMENT

JENNIFER BERTINO-TARRANT  
WILL COUNTY EXECUTIVE

KEVIN LYNN  
DIRECTOR

P. 815-740-4712  
F. 815-740-4604  
E. klynn@willcountyillinois.com

County Office Building  
302 N. Chicago Street  
Joliet, IL 60432

## NO BID Form

Please note: This form is only required if you are not bidding.

Solicitation Name/Number: \_\_\_\_\_

### Reason for not bidding:

- |  |  |
|--|--|
| <input type="checkbox"/> Not enough time to respond          | <input type="checkbox"/> Unable to compete                 |
| <input type="checkbox"/> Not applicable to company           | <input type="checkbox"/> No time to complete work          |
| <input type="checkbox"/> Unable to obtain required insurance | <input type="checkbox"/> Unable to meet specs/requirements |
| <input type="checkbox"/> Unable to obtain required bonding   |  |
| <input type="checkbox"/> Other (please detail below)         |  |

### Suggestions:

Company Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Date: \_\_\_\_\_

Please retain our information for future solicitations:  Yes  No