

OUTAGAMIE COUNTY
REQUEST FOR PROPOSAL
FOR
BENEFITS CONSULTING

Due By: July 17, 2026 – 1:00 pm (CT)

Deadline for vendor questions – June 23, 2026 Noon CT (Reference Section 4.0 for details)

1.0 Introduction and Background

Outagamie County is seeking proposals from qualified employee benefit consulting firms to assist in the planning, evaluation, procurement, implementation, marketing/communication, compliance, and ongoing administration of employee benefit programs.

The County intends to select a consultant to serve as a strategic advisor in managing benefit offerings that support workforce needs, fiscal stewardship, regulatory compliance, and administrative efficiency.

Organizational Background

- Type of employer: County government
- Number of benefit-eligible employees: 1,266
- Number of covered lives on health plan: 2,524
- Bargaining units involved: 1
- Current lines of coverage:
 - Health plan
 - Prescription drug
 - On-site and Near-site Employer Clinics
 - Dental
 - Vision
 - Life/AD&D
 - Short-term and/or long-term disability
 - FSA/HSA
 - COBRA administration
 - EAP
 - Wellness initiatives
 - Voluntary benefits

Reference the 2026 Benefit Guide for more detail of benefit offerings.

The purpose of this RFP is to identify a qualified consulting partner to:

- Evaluate current employee benefit plans and funding arrangements
- Support strategy development and plan design
- Assist with market analysis, underwriting review, and vendor procurement
- Provide compliance guidance on employee benefit laws and regulations
- Support marketing and employee communication efforts as needed
- Provide support in creating wellness programs
- Deliver ongoing service, reporting, and performance review support

2.0 **Scope of Services**

We are seeking the following services from the selected benefits consulting firm:

A. Strategic Benefits Consulting

- Review current benefit structure and overall strategy
- Benchmark benefit offerings, contributions, and cost trends
- Recommend plan design alternatives and cost-containment strategies
- Assist with long-term benefits planning aligned with recruitment and retention goals

B. Financial and Actuarial Analysis

- Review claims experience, utilization, trend, and reserve information
- Analyze funding methods, including fully insured and self-funded options if applicable
- Evaluate renewal proposals and underwriting assumptions
- Develop cost projections and contribution modeling
- Identify opportunities for cost savings and risk mitigation

C. Procurement and Vendor Management

- Develop and manage RFPs for insurance carriers, TPAs, PBMs, wellness vendors, stop-loss carriers, or other benefit vendors
- Assist in proposal evaluation and vendor selection
- Support contract review and implementation planning
- Monitor vendor performance and service standards

D. Compliance Support

- Provide guidance related to:
 - ACA
 - HIPAA
 - COBRA
 - Section 125
 - FMLA interaction with benefits
 - Medicare coordination
 - Mental health parity
 - Nondiscrimination considerations
 - Other federal and state requirements affecting employer-sponsored benefits
 - Assist with required notices, filings, and compliance calendars
 - Identify emerging legal or regulatory issues affecting the County

E. Open Enrollment and Employee Communication

- Assist with employee benefit communication strategies
- Review or develop open enrollment materials

- Support benefit education meetings and presentations
- Provide decision-support communication as requested

F. Ongoing Account Service

- Designate a primary account executive and service team
- Respond to routine and urgent questions
- Attend regular meetings with County staff
- Provide periodic reports and recommendations
- Coordinate issue resolution with carriers and vendors

3.0 Contract Term

We are seeking a contract to commence on January 1, 2027 and continue through December 31, 2029. There will be the option for four (4) one year extensions at the County's discretion.

4.0 Deadline for Vendor Questions

The deadline for vendor questions is Noon CT June 23, 2026. All questions shall be emailed to Nicole Schoultz at nicole.schoultz@outagamie.org. All questions will be answered online at www.outagamie.gov under Bids & Proposals then this project by end of day June 30th.

5.0 Confidential Information

Any proposals submitted in conjunction with this request will become a public record after award and consequently, open for complete public inspection. Proposals may not be marked with a blanket confidential disclosure.

Information cannot be kept confidential unless it is a trade secret. Trade secret is defined in §134.90(1)(c), Wis Stats. As follows: "Trade secret" means information, including formula, pattern, compilation, program, device, method, technique or process to which all of the following apply:

1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

Due to the nature of this service, we do not foresee any items being marked confidential. However, if there are confidential or proprietary sections of proposals which should be exempted from this requirement, Proposer(s) must complete Attachment A. Only items specifically referenced on Attachment A will be considered.

Notification of the county's determination on such requests will be made prior to release of any of the information in the proposal.

6.0 Insurance and Indemnification

See Attachment B. This form must be completed and returned with your proposal. However, the Certificate of Insurance will only be required from the awarded firm.

7.0 **Proposal Submittal**

In order to maintain uniformity between proposals it is required to submit your proposal in the following order.

- **Cover Letter** - Reference the company name, mailing address and physical location. Include the main point of contact and backup point of contact for this project along with their email and telephone numbers.
- **Section 1: Firm Information** – Provide a general description of the size of your firm, the geographical range in which you operate, the type of services you generally provide, and the type of clients you work with, including local governmental clients. If your firm is affiliated with another firm, identify the firm and describe the relationship.
- **Section 2: Qualifications** – Describe your firm’s qualifications and relevant experience for this project. Include both your overall capabilities and your specific expertise for each service area identified in Section 2.0, Scope of Services.
- **Section 3: Key Staff** – Provide the resumes of key account team members who will be assigned to this project. These individuals should be limited to the personnel who will be primarily dedicated to this project. Specifically list any Wisconsin municipal clients this person(s) currently works with or have worked with in the past.
- **Section 4: Similar Experience** - Provide a minimum of three and maximum of five similar clients. Include; company name, address, contact name, telephone number and email address. Provide information on these clients such as the services provided and length of time associated with your firm.
- **Section 5: Cost** - The annual compensation should be a set all-inclusive service fee (not based on commissions) that will include all of the required items as listed under the Scope of Services in Section 2.0. Include the Pricing Form in this section. Provide information on the payment terms in this section.

Additionally, in this section, describe any monetary benefits your firm may receive under this contract. The County expects that any such benefits derived from this agreement will offset the County’s service fee. Please include in this section a statement confirming your understanding of this expectation.

- **Section 6: Completed Forms** – Include completed Attachment A and Attachment B in this section. If an addendum is issued, provide the acknowledgement form (will be included with addendum) in this section.

Failure to provide all requested information may result in the rejection of your proposal.

8.0 **Contact Information**

Nicole Schoultz
Outagamie County, Procurement Coordinator
(920) 832-6083
Nicole.Schoultz@Outagamie.org

9.0 **Clarification and/or Revisions to the Specifications and Requirements**

Proposer must examine the RFP documents carefully and before submitting a Proposal may request from the County's contact person(s) additional information or clarification. A Proposer's failure to request additional information or clarification shall preclude the Proposer from subsequently claiming any ambiguity, inconsistency, or error.

The County will issue responses to inquiries and any other corrections or amendments it deems necessary in written addendum prior to the Proposal due date. Proposers should rely only on the representations, statements or explanations that are contained in this RFP and the written addendum to this RFP. Where there appears to be a conflict between the RFP and any addendum issued, the last addendum issued will prevail.

It is the Proposer's responsibility to assure receipt of all addenda. Outagamie County will post any addenda online at www.outagamie.gov under Bids & Proposals then this project. Upon posting, such addenda shall become part of the RFP and binding on Proposer(s).

10.0 **County Reservation**

- a. This proposal request does not commit Outagamie County to make an award or to pay any costs incurred in the preparation of a proposal in response to this request.
- b. The proposals will become part of Outagamie County's files without any obligation on Outagamie County's part.
- c. The proposer shall not offer any gratuities, favors, or anything of monetary value to any official or employee of Outagamie County for any purpose.
- d. Outagamie County reserves the right to request clarifications for any proposal.

11.0 **Closing Date**

Proposals will be received up to 1:00 pm CT July 17, 2026.

12.0 **Proposal Submittal**

Email proposals to: Nicole.Schoultz@outagamie.org

13.0 **Taxes**

Outagamie County is exempt from Federal Excise Tax (39-6005724), Wisconsin Sales Tax (ES 41005), but if there is a tax, such as local or county, it must be shown in the proposal.

14.0 **Method of Procurement**

The method for this procurement is competitive proposal, pursuant to Chapter 22 of the Outagamie County Code of Ordinances. After submission of the written proposal, qualified

proposers may be requested to make an oral presentation to a committee responsible for making final recommendations. The process allows for confidential negotiations and revisions.

15.0 Venue

This agreement will be governed and construed according to the laws of the State of Wisconsin. This agreement is performable in Outagamie County.

16.0 Status of Proposal

Upon award, proposals will be considered public record and details will be posted online. Information on status could be obtained from Outagamie County's web site www.outagamie.gov > Bids & Proposals.