

Lafayette Parish School System



Request For Proposals for

Voluntary Benefits and Administrative Services

RFP #07-27

Lafayette Parish School System
202 Rue Iberville
Lafayette, LA 70508

Advertisement for Request for Proposal

Notice is hereby given that a sealed **Request for Proposal (RFP)** will be received by the Lafayette Parish School System Purchasing Department located at 202 Rue Iberville, Lafayette, LA 70508 or electronically via www.centerlinebidconnect.com until **4:00 p.m. CST on July 28, 2026**. Proposals received after this time will not be considered. Delivery to any department other than the Purchasing Department is unacceptable and may result in non-consideration of the proposal.

Sealed proposals shall be clearly marked with the Proposer's Name and Address, along with the following:

Voluntary Benefits and Administrative Services

RFP# 07-27

RFP Opening: July 28, 2026, at 4:00 p.m. CST

The Lafayette Parish School System (LPSS) is soliciting proposals from qualified firms to provide integrated Third-Party Administrator (TPA) consulting and brokerage services to manage its voluntary benefits and administrative services.

LPSS intends to award an initial one-year contract, effective **January 1, 2027, through December 31, 2027**, with the option to renew for up to three (3) additional one-year terms, upon mutual agreement of both parties.

The successful proposer must begin implementation and support services before the contract start date to facilitate the Fall 2026 Open Enrollment period.

Complete Proposal Documents may be obtained without charge and without deposit from www.centerlinebidconnect.com. All electronic proposals shall be uploaded by the due date and time stated above. Questions about this procedure should be directed to: Centerline-Phone: 504-291-5738, email bidconnect@centerline.co.

Specifications will be available beginning **June 16, 2026**.

The Lafayette Parish School System strongly encourages the participation of minority-owned and small business enterprises.

The Lafayette Parish School System reserves the right to reject any and all proposals and to waive any informalities or irregularities in the proposals received, when such action is deemed to be in the best interest of the School System.

Lafayette Parish School System

Kristie Sam,
Purchasing and Procurement Coordinator

Advertisement Dates:

June 16, 2026

June 23, 2026

Please provide an Affidavit of Publication

Advertisement published in the official
journal of the Lafayette Parish School
System

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General Information

1.0 Public Notice

The Lafayette Parish School System (LPSS) is requesting proposals from an integrated Third-Party Administrator (TPA) consultant and brokerage services to manage its voluntary benefits and administrative services. The selected partner will oversee the entire lifecycle of the District's programs from strategic planning and implementation to daily administration and ongoing communications.

All potential proposers are to read and familiarize themselves with the terms and conditions listed within this RFP.

The issuance of this RFP in no way constitutes a commitment by LPSS to select an Administrator and / or award a contract. The LPSS reserves the right to accept or reject any or all proposals submitted. Acceptance of any proposal with contractual terms is dependent upon approval and appropriation of funds by LPSS.

LPSS intends to award an initial one-year contract, effective January 1, 2027, through December 31, 2027. The agreement includes the option to renew for up to three (3) additional one-year terms. *Please note, the successful Administrator must begin implementation and support services **prior** to the formal start date to facilitate the Fall 2026 Open Enrollment period.*

1.1 Calendar of Events

Below is the estimated schedule for this RFP process. All dates and times are subject to change. Except where specified, deadlines and events take place during standard business hours (7:30 a.m. to 4:30 p.m. CST).

The Lafayette Parish School System reserves the right, at its sole discretion, to adjust this schedule as it deems necessary. Notification of any adjustment to the schedule shall be provided to all parties who submit an ***Intent to Submit a Proposal Form, see Exhibit B.***

Event	Date	Time
Advertisement of RFP	6/16/26 & 6/23/26	
Intent to Submit a Proposal Form, Exhibit B Deadline (Mandatory Requirement - Send to Kristie Sam at kpsam@lpssonline.com)	7/6/26	8:00 a.m.
Deadline for Questions / Inquiries from Proposer to LPSS (Send to Kristie Sam at kpsam@lpssonline.com)	7/9/26	12:00 p.m.
LPSS Responses to Submitted Questions from Proposers	7/13/26	4:00 p.m.
RFP Submission Deadline	7/28/26	4:00 p.m.
RFP Committee Review & Scoring	7/29/26 - 7/30/26	
LPSS Notification to Top-Ranked Proposers	7/31/26	12:00 p.m.
Finalist present to Board Insurance Committee (BIC)	8/5/26	2:00 p.m. District Office Board Room
Award of Contract by Lafayette Parish School Board (LPSB)	8/13/26	5:30 p.m. District Office

		Board Room
Voluntary Benefits Commitment <i>precedes</i> the formal Contract start date to ensure continuous coverage and seamless onboarding for all eligible participants	Begins during the Open Enrollment Period in the Fall of 2026 for benefits effective 1/1/27	
Voluntary Benefits Administrator Contract Start Date	1/1/27	

1.2 Lafayette Parish School System General Information

The Lafayette Parish School System is a premier Pre K-12 district located in Lafayette, LA. With a current enrollment of 29,694 students, it officially ranks as the sixth-largest school system in the State of Louisiana.

The successful proposer must be capable of providing on-site services to 46 District campuses and administrative locations, including 24 Elementary, 10 Middle, and 10 High School campuses.

The Lafayette Parish School System (LPSS) provides voluntary benefits to active employees and their eligible dependents based on the following requirements:

- Full time employees must work a minimum of thirty (30) hours per week.
 - Our workforce comprises more than 4,300 active, benefit-eligible employees.
- When determining eligibility, all Bus Drivers, Bus Attendants, and Board Members are eligible for enrollment and considered active full-time employees.
- Coverage becomes effective on the first of the month following thirty (30) days of continuous employment.

Voluntary benefits are elected by the employee, with premiums collected via a monthly payroll deduction in accordance with the District's established payroll schedule.

Current Employee Paid Voluntary Benefit Programs and Participation

After the award of contract, the Voluntary Benefits Administrator will evaluate all voluntary benefit lines to ensure market competitiveness. The goal is to maintain or enhance current offerings to strengthen the District's recruitment efforts and long-term employee retention strategies.

The following section outlines the District's current suite of voluntary, employee-paid benefits and memberships. The successful proposer must demonstrate the ability to facilitate a seamless transition, including automated enrollment integration with payroll for active employees and pension / ACH deductions for retirees. Current specifications for all active employee voluntary benefit products are available for review at [CLICK HERE](#).

- **Accident Insurance:** TransAmerica
 - Membership: **1183**
- **AGM Protection Pack:** Aura Digital Guard providing legal and credit protection
 - Membership: **219**
- **Cancer Insurance:** Guardian
 - Membership: **942**
- **Critical Illness:** Guardian
 - Membership: **882**
- **Dental:** Ameritas (Active, Retired and Grandfathered)

- Membership: **2704**
 - Requires pension / ACH deductions for retirees
- **Flexible Spending Accounts (FSA):**
 - EBC Full Medical FSA: **175**
 - Limited Purpose FSA: **15**
 - Dependent Care FSA: **10**
- **Health Savings Accounts (HSA):** EBC, with high yield interest/investment options
 - Membership: **358**
- **Hospital Indemnity:** CHUBB
 - Membership: **653**
- **Long-Term Care:** UNUM (Closed to new elections; legacy accounts)
 - Membership: **38**
- **Long-Term Disability:** VOYA
 - Membership: **1,032**
- **Short Term Disability:** VOYA
 - Membership: **1,474**
- **Supplemental Group Term Life with AD&D:** VOYA (Active & Retired)
 - Membership Employee: **919**
 - Membership Spouse: **358**
 - Membership Child(ren): **506**
 - Membership Retired: **463**
- **Universal Life:** TransAmerica
 - Membership: **880**
- **Vision:** Superior Vision (Active & Retired)
 - Membership: **2,259**
- **Employer-Sponsored (District-Funded) Benefit**
 - Life Insurance: VOYA
 - Basic Group Term Life Insurance with AD&D
 - **Active Employee:** Age-Based Benefit Reduction.
 - Current membership is **4,283** members.
 - \$10,000 under age 65 years
 - Reduces to \$7,500 at age 65.
 - Reduces to \$5,000 at age 70.
 - **Retired Member:** Age-Based Benefit Reduction.
 - Current membership is **3,321** members.
 - \$5,000 regardless of age based on District retirement.

1.3 Scope of Services

The Lafayette Parish School System (LPSS) invites proposals from an integrated Third-Party Administrator (TPA) and brokerage specializing in voluntary benefits. The successful proposer must demonstrate a proven track record of managing and successfully supporting complex benefit portfolios for large-scale school districts, governmental agencies, or corporate enterprises of comparable or greater complexity.

Scope of Administrative Services: Strategic Plan Design & Market Analysis

- Analyze existing voluntary benefit programs to design a personalized, comprehensive plan. The strategy *must maintain or enhance* current benefit offerings.
- Conduct market research and lead pricing negotiations for LPSS benefit programs. Evaluation emphasis shall be placed on service and customer support levels, plan design, premium competitiveness, increasing total benefit rewards, renewals and contractual terms.

- Prioritize the inclusion of Guaranteed Issue and fully portable benefits to ensure long-term value for employees.

Scope of Administrative Services: Vendor & Implementation Management

- Oversee all facets of vendor transitions, including data integration, consolidated billing setups, and comprehensive communication strategies.
- Act as the primary intermediary between the LPSS Insurance & Benefits Department and all voluntary benefit carriers.
- Meet with the Insurance & Benefits Department within thirty (30) days of award of contract to finalize account administration protocols, approve communication materials, and establish a formal implementation timeline.

Scope of Administrative Services: Specialized Administration & Compliance

- Provide full-service management of Section 125 regulations, including full Medical, Limited Purpose and Dependent Care Flexible Spending Accounts.
- FSA Member Services:
 - Deliver high touch support in close collaboration with the District's Insurance & Benefits Department to provide reporting and oversight to ensure strict compliance.
 - Responsibilities include the mandatory collection and verification of all IRS-required documentation.
 - Remedy unresolved FSA transactions, adhering to the Summary Plan Description (SPD) and District internal controls to protect fiduciary interests.
 - This role requires proactive, ongoing engagement with employees to facilitate timely document filing and resolution via electronic, phone, and hard copy mailed communications for unresolved transactions.
 - Requires multi-channel customer service support. Instant fund access via debit card technology. Real-time online account access and mobile claim submissions.
- Manage all COBRA administrative duties, ensuring adherence to federal/state regulations, timely distribution of required notices, and collection of all premiums.
- Maintain all record-keeping and documentation through a secure BenAdmin platform that utilizes industry-standard encryption to protect sensitive/confidential information.

Scope of Administrative Services: Account Management & Support

- Assign a permanent Account Management Team to provide LPSS with day-to-day operational support and complex billing resolution.
- Ensure availability for member issue resolution via on-site support, dedicated call center, and email.
- Provide ongoing consultation regarding plan performance, market trends, and immediate resolution of any plan interruptions.

Scope of Enrollment Services: Onboarding & New Hire Support

- **The successful proposer shall:**
 - Be required to deliver a formal presentation detailing all voluntary benefit offerings. The District hosts two large-scale, in-person events for 350+ new hires on two separate dates. The orientation is intended for instructional and educational purposes only; active benefit enrollment will not be completed at this event.
 - Provide support for continuous onboarding throughout the year through multi-modal enrollment opportunities to include: a secure, user-friendly web portal for online self-service enrollment and support/enrollment from licensed benefit counselors

through a dedicated call center.

Scope of Enrollment Services: Annual Open Enrollment (OE)

The successful proposer must have the proven ability to execute a five-week Open Enrollment schedule via the following methods ensuring employee engagement and understanding. See **Exhibit C** for additional details regarding Open Enrollment.

- Qualified benefit counselors providing personalized, one-on-one enrollment support at all District campuses and administrative sites. This on-site presence is required for the duration of the annual Open Enrollment period (typically five weeks, mid-September through mid-October).
- Experienced agent assistance provided through a call center.
- A secure, user-friendly 24/7 online enrollment portal.
- To accommodate the diverse schedules of District staff, the successful proposer shall provide extended service hours during Open Enrollment, including evening and weekend availability.
- The administrator will coordinate a physical mail-out to member households for all active employees, delivering enrollment instructions and benefit highlights.
- The administrator will provide a comprehensive, ready-to-launch communication kit. It is the expectation of the District that Open Enrollment communications will be ongoing, comprehensive and produced in various formats.
- Counselors shall provide personalized guidance to help employees identify coverage gaps and understand how voluntary benefits supplement their primary insurance.
- The successful proposer is responsible for ensuring the timely delivery of Certificates of Coverage (detailing services, limitations, and exclusions) and all applicable Membership Cards to participants.
- Provide multiple reminders to all members of the benefit deadline approaching via email and/or text messaging.

Scope of Enrollment Services: Implementation & Transition Requirements

- **The successful proposer shall:**
 - Collaborate with the District's current service providers to ensure a seamless data transfer and continuity of coverage during the transition period.
 - At no additional cost to the District, provide services for New Teacher Orientation and Open Enrollment *prior* to the formal contract commencement date, per the schedule in **Exhibit C**.

Scope of Strategic Communications & Engagement

- **The successful proposer shall:**
 - Provide multi-channel delivery opportunities through media, including digital, printed, and self-directed instructional videos to ensure employee comprehension.
 - Create and maintain a dedicated, up-to-date voluntary benefits website providing 24/7 access to plan details, claim forms, educational resources and vendor contact information.
 - Prepare and deliver communications and presentations to employees, retirees, District leadership, the Employee Retiree Insurance Advisory Panel (ERIAP), the Board Insurance Committee (BIC), and the Lafayette Parish School Board (LPSB).

Scope of Billing Services: Monthly Reconciliation & Discrepancy Management

- **The successful proposer shall:**
 - Perform monthly reconciliation of all voluntary benefit billings to identify and resolve premium errors, recurring administrative concerns, retroactive adjustments, and reimbursements.
 - Demonstrate the ability to achieve seamless integration, ensuring that all benefit data exchanges are automated, accurate, and require minimal manual intervention from District staff.
 - Act as the primary lead in facilitating and expediting the resolution of billing discrepancies directly with insurance carriers on behalf of LPSS.
 - Partner closely with the Insurance & Benefits Department to manage file upload submissions, address data discrepancies, and process "catch-up" credits or arrears.

Scope of Billing Services: Systems Integration & Payroll Interface (LINQ or ALIO System)

- **The successful proposer shall:**
 - Utilize a BenAdmin platform capable of seamless, automated transmission of payroll deduction files to the LINQ or ALIO system.
 - Upon contract award, and prior to the service commencement date, the selected vendor must demonstrate full software integration with the LINQ or ALIO platform.
 - Solely responsible for all costs and fees associated with the development, implementation, and ongoing maintenance of the interface between their platform and the LINQ or ALIO system.

Scope of Retiree Services

The selected vendor is responsible for delivering comprehensive post-retirement support to LPSS retirees. Ensuring seamless continuity of voluntary benefits through dedicated customer service, portability guidance, and premium collection process. This includes managing the transition from active to retiree status and facilitating direct-billing solutions.

- Provide dedicated customer service support for LPSS retirees regarding the District-paid \$5,000 Group Term Life Insurance and AD&D benefit.
- Lead the market solicitation process during renewal periods to secure competitive pricing and favorable terms for the Retiree Group Term/AD&D Life insurance benefit.
- The successful proposer shall provide comprehensive, high-touch support to beneficiaries during the life insurance claims process and will act as the primary intermediary to expedite claims submission, approval and benefit payout.
 - Key duties include: verifying beneficiary designations, assisting families with the accurate completion of claim forms, acting as a liaison with carriers to resolve any processing delays or documentation discrepancies and updating beneficiary information as member changes are made,
- On an annual basis, provide District staff with comprehensive "Age-Up Reports" that identify affected members and calculate the fiscal impact of premium adjustments for the upcoming plan year and manage all communications regarding life insurance "age-ups," ensuring timely notification of both coverage reductions and associated premium increases.
- Provide customer service and targeted communication support during carrier transitions to ensure retirees experience no lapse in coverage or confusion regarding their benefits.

Scope of Dental Benefits Administration

- Retiree Premiums are collected via deductions from the state pension system or through ACH. To ensure seamless processing, the successful proposer must:
 - Be an approved vendor with the Teachers' Retirement System of Louisiana (TRSL) and possesses the capability to perform direct data uploads.
 - Shall assume *sole responsibility* for the distribution, collection, and secure processing of all ACH authorization forms ensuring all banking data is collected accurately and maintained in compliance with financial privacy regulations.
- **Communications Strategy & Outreach:** The successful proposer will manage the primary communications campaign to alert members of required actions for change.
 - Conduct two (2) dedicated onsite sessions to educate, collect authorization forms, verify banking data, and provide technical assistance to members.
 - Provide formal printed notices sent to the member's home address.
 - Have an automated notification system for voice and digital communications.
 - To prevent the involuntary cancellation of benefits due to non-payment or banking errors, the TPA shall implement an extended grace period of up to 90 days post-January 1st.

Scope of Portable Benefits Support

- **The successful proposer shall:**
 - Provide end-to-end administrative billing and member support for all voluntary programs offering portability due to retirement (to include members who are resigning). This includes facilitating one-on-one 'Retirement Transition' consultations with active employees to provide guidance on maintaining coverage.
 - Be responsible for assisting members with the accurate completion of *all portability applications* and providing clear instructions on post-termination premium payment structures to ensure continued coverage.
 - Manage the premium collection and reconciliation process for retirees who transition from payroll deduction to direct-pay or pension-deduction models.

Proposal Specifications

2.0 General Conditions of RFP

Proposals must be prepared in a straightforward and concise manner, providing a clear and comprehensive response to all requirements outlined in this RFP. The District will place emphasis on the completeness of the submission, the clarity of the proposed solutions, and the vendor's overall responsiveness to the specified Scope of Services.

Required Proposal Components

For a proposal to be considered responsive, the following items must be included in the submission in the order listed below:

Administrative & Legal Documents

- **Exhibit A: Addenda Acknowledgement.** Required only if the District issues formal

- addenda during the solicitation period. If no addenda are issued, this form may be omitted.
- **Exhibit B: Intent to Submit Proposal.** A completed and signed copy of the mandatory intent form by **July 6, 2026 at 8 AM.**
 - **Evidence of Licensure and Statutory Compliance:**
 - **TPA** - Proposers must submit documentation of an active, current formal Third Party Administrator license issued by the Louisiana Department of Insurance (LDOI).
 - **Broker / Producer** - A Louisiana health insurance broker license, authorized by the Louisiana Department of Insurance (LDOI), is required to sell insurance.
 - This requirement applies to *all entities involved in the proposed service model.*
 - **Partnership Models:** Joint proposals involving a Broker and a TPA require the submission of current, active licenses for both organizations. The District reserves the right to disqualify any proposal that fails to include up-to-date licensing for all entities involved in the partnership.
 - **Litigation & Contract History:** A detailed disclosure of any professional citations, active or pending lawsuits, and contracts terminated for cause within the last five (5) years.

Executive & Personnel Qualifications

- **Executive Summary:** A high-level overview of the proposal, signed by a principal or authorized representative with the legal authority to negotiate terms and execute a binding contract on behalf of the firm.
- **Key Personnel Resumes:** Comprehensive professional resumes for the Lead Account Executive and all Account Managers designated for the LPSS account.
- **References & Market Experience:** A list of five (5) professional references. For each reference, identify the organization type and provide a percentage breakdown of your total clientele that consists of school districts, governmental entities, or large-market corporate employers of similar or greater scale to LPSS.

Technical & Marketing Samples

- **Technology Specification:** Identification of the BenAdmin platform that will be utilized to service the LPSS contract, including versions and integration capabilities.
- **Communications Sample:** A representative *sample* of a Benefits Enrollment Booklet (Digital or Print) used for New Hire Orientations or Annual Open Enrollment campaigns.

Legal & Administrative Documentation

- **Contract:** A sample of the vendor's standard service agreement or contract.
- **Submission Format (Printed Proposals):** If submitting physical documents, provide one (1) original and six (6) complete copies.
- **Conflict of Interest & Performance History:** Proposers must explicitly state whether the company or any of its principals have ever been terminated for cause by the Lafayette Parish School System. *Notice: Any proposer or principal previously terminated for cause by LPSS will be automatically disqualified from further consideration.*

Security & Quality Assurance

- **Data Security Protocols:** A comprehensive copy of the firm's written policies and procedures regarding secure communications and data protection (e.g., encryption standards and HIPAA compliance).
- **Service Excellence:** A sample Employee Satisfaction Survey used to gauge member experience and service quality.

Technical Integration & Payroll Interoperability

- **LINQ Compatibility Evidence:** Proposers must provide technical documentation demonstrating their software's ability to transmit payroll deduction files to the **LINQ**.
- **Mandatory Demonstration:** The selected vendor must successfully demonstrate full system interoperability with LINQ *no later than 15 days from award of contract*.
- **Performance Contingency:** Failure to successfully demonstrate compatibility by the specified deadline may result in the immediate termination of the contract.
- **Financial Responsibility:** The selected vendor shall bear all costs associated with the integration, testing, and maintenance of the interface between their platform and LINQ.

2.1 Exhibit B: Intent to Submit a Proposal

To ensure that all interested parties receive formal notifications, mandatory addenda, and technical clarifications, prospective proposers must submit a completed *Intent to Submit a Proposal Form* (see *Exhibit B*). Submission of this form is a prerequisite for receiving direct communications from the District regarding this solicitation.

The completed *mandatory* form must be received no later than **July 6, 2026, at 8:00 AM**, as specified in the Calendar of Events section.

Proposers must email the completed mandatory form (found in **Exhibit B**) to the Purchasing and Procurement Coordinator, Kristie Sam at kpsam@lpssonline.com.

2.2 Proposal Submittal Process

Inquiries and Clarifications from Vendor

The District will only consider written inquiries regarding RFP requirements or the Scope of Services. All questions must be submitted by **July 9, 2026, at 12 PM** to Kristie Sam, Purchasing and Procurement Coordinator, at kpsam@lpssonline.com. All responses will be issued via formal addenda and posted at www.centerlinebidconnect.com; oral clarifications shall not be binding.

RFP Proposal Submission Deadline & Instructions

RFP Proposals must be received no later than **July 28, 2026 at 4 PM CST**. Proposers may choose one of the following three methods for submission.

- Proposers must submit one (1) original (clearly marked "Original" and containing a legally binding signature) and six (6) complete copies.
- Proposals must be in a sealed envelope or package clearly labeled with the Proposer's Name, Address, RFP Title, RFP Number, and RFP Due Date.
- **Mailing Address**
Lafayette Parish School System
Attn: Kristie Sam, Purchasing and Procurement Coordinator
P.O. Drawer 2158, Lafayette, LA 70502
- **Physical Address**
Lafayette Parish School System
202 Rue Iberville, Lafayette, LA 70508
Note: Deliver to the receptionist. For receipt of delivery, contact Kristie Sam (kpsam@lpssonline.com), Purchasing and Procurement Coordinator.

- **Electronic Submission**

- In lieu of paper copies, proposals may be submitted digitally via www.centerlinebidconnect.com. Electronic submissions must be completed by the deadline date / time listed above.
- The proposer assumes all risk regarding the chosen delivery method. LPSS is not responsible for delays caused by delivery services or postal issues. *Postmarking by the due date does not constitute receipt*. Proposals received after the 4:00 p.m. deadline will be rejected. No extensions will be granted.
- Failure to submit all requested information, including evidence of Louisiana Broker/TPA licensure, will result in the proposal being deemed non-responsive and rejected.
- Interested companies are limited to one response. Multiple submissions associated with the same firm may result in the rejection of all related proposals.
- No amendments, revisions, or alterations will be accepted after the submission deadline. Proposers are liable for any errors or omissions in their submission.

Rights of the District

- All submitted materials become the property of LPSS.
- Submittals will remain confidential during the evaluation process. Upon issuance of a "Notice of Intent to Award," all proposals become public records under Louisiana law.
- LPSS reserves the right to: reject any or all proposals; waive minor informalities or defects; request additional information for evaluation purposes; cancel this RFP at any time if deemed in the District's best interest.
- LPSS is not responsible for any costs incurred by the proposer in the preparation, submission, or presentation of their proposal.

Waiver of Objections

Submitting a proposal constitutes acceptance of all terms, conditions, and evaluation criteria. Proposers must review the RFP for defects or necessary clarifications. Any objections or protests are considered waived if they are not brought to the District's attention in writing prior to the Deadline for Clarifications.

2.3 Equal Opportunity and Non-Discrimination

The Lafayette Parish School System (LPSS) is an Equal Opportunity Employer. In alignment with the District's commitment to economic inclusion.

In the performance of any contract resulting from this RFP, the selected vendor shall not discriminate against any individual, including employees, District staff, retirees, or program participants on the basis of: Race, color, or national origin; Religion or creed; Sex, gender identity, or sexual orientation; Age; Physical or mental disability/handicap; Genetic information and any other classification protected by Federal or Louisiana constitutional or statutory law.

No person shall be excluded from participation in, denied the benefits of, or subjected to discrimination under any program or activity managed by the vendor on behalf of LPSS.

As a condition of award, the proposer must certify that their firm maintains employment practices that are free from discrimination. This certification of non-discrimination is a mandatory requirement and will be incorporated as a binding provision of the final contract. By submitting a proposal, the vendor affirms its compliance with all applicable federal and state civil rights laws,

including Title VII of the Civil Rights Act and the Americans with Disabilities Act (ADA).

2.4 Conflict of Interest and Ethical Standards

By submitting a proposal, the Proposer certifies that, at the time of contracting, they possess no interest, direct or indirect, that would conflict with the performance of the required services. The Proposer further certifies that, in the performance of the contract, they shall not employ any individual possessing such a known conflict of interest.

The Proposer must ensure that no unethical relationships, as defined by the Louisiana Governmental Code of Ethics, exist between the firm (including its employees, brokers, or principals) and LPSS. Specifically, the Proposer shall ensure no improper or illegal relationships exist with: any Lafayette Parish School Board (LPSB) member or District official; any member of the Employee Retiree Insurance Advisory Panel (ERIAP); any member of the Board Insurance Committee (BIC) and any District staff member or principal.

As part of the technical submission, all Proposers must explicitly disclose the following:

- Identify if the Proposer is owned, in whole or in part, by any insurance carrier or provider. Disclose any financial investment or personal relationship with owners or employees of any carrier to which the Proposer sells voluntary benefits.
- Disclose whether the Proposer's Benefit Consultants or enrollment staff receive commissions, overrides, or bonuses for enrolling members in voluntary benefit products.
- Confirm whether the Proposer's Benefit Consultants are compensated via a fixed salary.

LPSS reserves the sole and absolute right to determine the materiality of any disclosed or discovered relationship, regardless of intent. Discovery of an undisclosed conflict of interest may result in the immediate disqualification of the proposer or the cancellation of a contract award. Such actions shall be taken without fault or liability to LPSS.

2.5 Protest Procedures

To be considered, a formal protest must be submitted in writing and received by the Lafayette Parish School System within five (5) business days following the District's issuance of the Notice of Intent to Award. Any protest received after this five-day window shall be deemed untimely and will not be considered.

The written protest must be comprehensive and include, at a minimum, the following information: the name, physical address, and telephone number of the protesting organization; the signature of a principal of the firm or a legally authorized representative; the specific RFP name and solicitation number; a detailed, point-by-point statement of the legal and factual grounds for the protest. This list includes specific references to the RFP terms, state statutes, or District policies alleged to have been violated; copies of all relevant documents, exhibits, or evidence supporting the protest and a clear statement of the specific ruling or relief requested from the District.

Protests must be delivered to the RFP Purchasing and Procurement Coordinator Kristie Sam. The District will review the merits of the protest based on the documentation provided. During the review period, the District reserves the right to maintain the stay of the award or proceed if it is determined to be in the best interest of the District.

2.6 Insurance and Liability Requirements

The successful Proposer shall, at its own expense, maintain the following insurance coverages. Proof of insurance (Certificate of Insurance) must be submitted to the District within five (5) business days of a request or notice of intent to award:

- Statutory coverage in accordance with the laws of the State of Louisiana, including Employer's Liability with minimum limits as required by law.
- Coverage for bodily injury (including death) and property damage with a minimum limit of \$1,000,000 per occurrence.
- Specific coverage for the administration of benefit programs and TPA services with a minimum limit of \$1,000,000 per occurrence.
- If the primary policy limits are less than those specified above, the District will accept a follow-form umbrella policy that brings the aggregate combined limits to the required levels.

To the fullest extent permitted by law, all insurance policies shall include the following provisions: LPSS shall be named as an Additional Insured on the Commercial General Liability and Umbrella policies; a waiver of subrogation shall be issued in favor of the Lafayette Parish School System for all applicable coverages; the Proposer's insurance shall be primary, and any insurance maintained by the District shall be non-contributing and each policy shall be endorsed to provide the District with at least thirty (30) days' prior written notice of any cancellation, non-renewal, or material reduction in coverage.

2.7 Venue

The laws of the State of Louisiana shall govern in connection with the formation, performance and legal enforcement of any resulting Contract. The 15th Judicial District Court for the Parish of Lafayette, State of Louisiana, shall be the exclusive venue and jurisdiction for any litigation that may arise from the resulting Contract.

2.8 Cancellation and Reservation of Rights

LPSS reserves the right to cancel this RFP, in whole or in part, at any time and at its sole discretion. Such cancellation shall be without fault, penalty, or liability to the District. Furthermore, LPSS reserves the right to reject any and all proposals received, to waive any informalities, or to re-solicit for services if it is determined to be in the best interest of the District.

2.9 Acceptance of Terms and Conditions

The submission of a proposal shall constitute a firm and binding offer. The signature of the authorized representative on the proposal signifies an explicit acknowledgment of this condition and affirms that the proposer is prepared to execute a contract under the terms described.

By submitting a response, the Proposer acknowledges and accepts all terms, conditions, specifications, and compensation structures set forth in this RFP. These requirements shall serve as the baseline for the final contract between the District and the selected vendor. LPSS reserves the right to negotiate contract terms and conditions to include standard commission structures received from vendors.

Proposers must clearly and thoroughly identify any specific variations or exceptions between their proposal and the District's RFP requirements.

- Any exception must be explicitly cited in a designated section of the proposal labeled

- "Statement of Deviations/Exceptions."
- Failure to identify such variations at the time of submission shall be deemed a conclusive waiver of the Proposer's right to subsequently modify the terms of performance, unless such modifications are specifically invited by the District during the post-award negotiation process.

2.10 RFP Purchasing and Procurement Coordinator

Requests for copies of the RFP and any requests for information relating to the RFP shall be directed to the main point of contact as follows:

Lafayette Parish School Board
 Attention: Kristie Sam
 P.O. Drawer 2158, Lafayette, LA 70502
 (337) 521-7338
kpsam@lpssonline.com

From the date of this solicitation's issuance until the final contract award is made by the Board, all Proposers, including their consultants, sub-consultants or any parties acting on their behalf are *strictly prohibited from contacting* the following individuals regarding this RFP: any Lafayette Parish School Board (LPSB) member; the Superintendent of Schools; any member of the Board Insurance Committee (BIC); any member of the Employee Retiree Insurance Advisory Panel (ERIAP) and any District staff member or panelist assigned to the evaluation of proposals.

There is strict adherence for a fair, transparent, and competitive procurement process. Any attempt by a Proposer, or an agent acting on their behalf, to circumvent these procedures by initiating unauthorized contact with the individuals identified above shall constitute a material breach of the RFP instructions. At the sole discretion of the District, such violations may result in the immediate and permanent disqualification of the Proposer from this and future solicitation opportunities.

All communications, questions, or requests for clarification must be directed *exclusively* to the RFP Purchasing and Coordinator, Kristie Sam, kpsam@lpssonline.com.

Proposal Evaluation

3.0 Evaluation and Selection Criteria

The Lafayette Parish School System uses a 106-point objective scale to evaluate proposals. To earn the highest score, please provide detailed responses for every criterion listed below.

Technical Capability and Scope Alignment

- Assessment of the Proposer's ability to deliver the services outlined in the Scope of Work.
- Evaluation of the proposed workflows, software capabilities (LINQ integration), and data security protocols.

Corporate Experience and Stability

- Consideration of the organization's tenure in the industry, financial stability, and overall track record in Third-Party Administration and Brokerage services.

- Demonstrated experience managing benefit portfolios for Pre K-12 school districts, governmental agencies, or large-scale corporate entities of similar or greater complexity than LPSS.

Personnel Qualifications and Account Management

- Review of the resumes and professional credentials of the specific Lead Account Executive and support team designated for the LPSS account.
- Evaluation of the proposed staffing model to ensure responsive, high-touch service for both active employees and retirees.

Performance Validation

- A review of the provided references, with a focus on the organization's ability to maintain long-term client relationships and high satisfaction levels.
- Analysis of the Proposer's current client base and their success in similar public-sector environments.

Description	Points Possible
Executive Summary and Company Profile	5
Payroll System Integration with LINQ	5
Professional References	5
Key Personnel and Professional Resumes	5
Market Experience & Longevity	5
Company Affiliation and Conflict of Interest	3
Sample Service Agreement	1
Credentials and Compliance	10
Litigation and Legal	12
Regulatory Compliance	4
Administrative Services	16
Communications Support	17
Enrollment Services	6
Billing Services	6
Retiree Services	6
Total Points	106

3.1 Proposal Questions

(#1) Executive Summary and Company Profile (5 Points)

The Proposer shall submit a comprehensive Executive Summary as the introductory component of the proposal. This section will be evaluated based on the depth, transparency, and relevance of the information provided.

The Executive Summary must include a detailed narrative covering the following:

- Legal status of the business (e.g., Sole Proprietorship, Partnership, Corp., LLC).
- Total number of full-time employees within the firm and the total number of staff members who will be assigned to the LPSS contract.
- The company's annual employee turnover rate over the last three years.
- A description of any mergers or acquisitions involving the firm within the last five (5) years, including any currently pending transactions.
- The total number of school districts, governmental entities, and large-scale corporate clients (similar to or larger than LPSS) currently serviced.
- Cumulative years of experience servicing Pre K-12 and governmental markets.
- Specific examples of the size (member count) of public-sector clients.
- The statement of the firm's commitment to customer service, quality assurance and account management ethics.
- A strategic overview of the firm's professional capability to execute the specific Scope of Work requested by the Lafayette Parish School System.

Evaluation Scoring Rubric. Detailed Response (5 Points): The proposer provided exhaustive and specific information for every required topic listed below. **Limited Response (1–4 Points):** The proposer omitted one or more required topics or provided vague information.

(#2) Payroll System Integration with LINQ or ALIO Systems (5 points)

The Lafayette Parish School System requires a seamless, automated exchange of data between the selected TPA platform and the District's LINQ payroll system, or its predecessor ALIO. This integration is critical for accurate premium deductions and member eligibility.

- State the total number of years your firm has actively maintained automated data interfaces with the LINQ or ALIO platform.
- Provide at least two (2) specific examples of current or past clients where your software successfully transmits payroll deduction files to LINQ or ALIO system users.

If your firm has not previously integrated with LINQ or ALIO systems, you must provide the following to demonstrate technical readiness:

- Describe your ability to map data to the specific file formats required by LINQ or ALIO.
- Provide examples of successful integrations with other major public-sector payroll systems.
- Provide a milestone-based project plan ensuring full system interoperability by August 20, 2026.
- Acknowledge that the vendor bears all costs associated with this integration and that failure to meet the deadline may result in contract termination.

Evaluation Scoring Rubric. Detailed Response (5 Points): The proposer provided specific examples of successful ALIO integrations, a technical methodology for file transfers, and/or a clear, realistic project timeline for implementation.
Limited Response (1–4 Points): The proposer provided a vague confirmation of ability without technical evidence, lacked specific system experience, or failed to provide a viable implementation schedule.

(#3) Professional References (5 points)

Proposers must provide five (5) professional references from current or former clients. Each reference is worth one (1) point, provided all required information is included. *Notice: The Lafayette Parish School System reserves the right to contact any reference provided. Points may be deducted if a reference provides a negative performance report or if the District is unable to verify the information provided.*

For each of the five references, the following information *must be clearly documented*:

- Name of the entity and the total number of covered lives (employees/retirees) managed.
 - Provide the name, professional title, direct email address, and telephone number of an individual authorized to discuss the vendor's performance.
 - The dates of service (Start Date to Present/End Date).
 - A detailed list of the specific services delivered (e.g., Brokerage, TPA, COBRA administration, Enrollment Software).
 - The name of the Lead Account Executive or Manager who serviced this specific reference.
-

(#4) Key Personnel and Professional Resumes (5 points)

Proposers must submit professional resumes for the specific team members who will be directly responsible for the LPSS account. This must include:

- The Lead Account Executive and/or Account Manager who will serve as the primary point of contact for District leadership.
- Key personnel responsible for data integration, claims resolution, and retiree support.
- Each resume must clearly highlight:
 - Total years in the insurance/benefits industry.
 - Specific experience working with school districts or governmental entities.
 - Relevant licensures and educational background.
- A brief statement for each individual outlining their specific day-to-day responsibilities regarding the LPSS account.

Evaluation Scoring Rubric. Detailed Response (5 Points): The proposer provided comprehensive resumes for all lead personnel and key support staff, demonstrating significant experience in Pre K-12 or public-sector benefit administration. **Limited Response (1–4 Points):** Resumes were missing for key roles, lacked sufficient detail, or failed to demonstrate experience with organizations of similar size and complexity to LPSS.

(#5) Market Experience and Longevity (5 points)

The District seeks a partner with a proven track record of stability and understanding of the voluntary benefits landscape. Points in this category will be awarded based on the firm's established tenure in providing both voluntary benefits and comprehensive administrative services.

- State the total number of years your company has been in continuous operation providing voluntary benefits and administrative services to include the total number of School Districts, Governmental Entities, and/or Large Corporations (4,000+ lives) currently receiving both voluntary benefits and administrative services by your organization.

Evaluation Scoring Rubric. Detailed Response (5 Points): The Proposer provides a comprehensive list of five (5) or more clients of similar or greater size, with a clear emphasis on school districts or governmental agencies. State the Proposer's experience managing large-scale, complex populations. To earn maximum points, the Proposer must demonstrate a proven track record of servicing organizations that meet or exceed the size and operational requirements of LPSS (approx. 4,000+ employees/ 3,000+ retirees). **Limited Response (1–4 Points):** The Proposer lists fewer than five (5) comparable clients or provides data on groups significantly smaller than LPSS.

(#6) Company Affiliation and Conflict of Interest (1 point)

This section evaluates the independence and objectivity of the Proposer. The Lafayette Parish School System seeks to ensure that all recommendations provided are made in the District's best interest, free from the influence of carrier-based incentives or ownership conflicts.

Is your company owned (in whole or in part) by an insurance carrier? Does your firm, its principals, or its employees have any financial investments or personal relationships with the owners or employees of any carrier/provider whose voluntary benefit products you represent?

- No **(1 Point)**: The firm is independent and free of carrier affiliation.
 - Yes **(0 Points)**: A potential conflict of interest exists.
-

(#7) Company Affiliation and Conflict of Interest (1 point)

Do your Benefit Consultants or enrollment staff receive commissions, overrides, or performance-based bonuses for enrolling or maintaining enrollment in voluntary benefit products?

- No **(1 Point)**: The firm operates under a non-commissioned service model.
- Yes **(0 Points)**: A commission-based incentive structure is in place.

(#8) Company Affiliation and Conflict of Interest (1 point)

Are your Benefit Consultants compensated via a fixed professional salary?

- Yes **(1 Point)**: Professional salary model.
 - No **(0 Points)**: Alternative or incentive-based compensation model.
-

(#9) Sample Service Agreement (1 point)

The Proposer must include a copy of their Standard Service Agreement or Master Contract that would govern the Voluntary Benefit and Administrative Services requested in this RFP. This document serves as a baseline for understanding the Proposer's standard operating terms.

LPSS reserves the right to: Reject any or all terms and conditions contained within the Proposer's sample contract. Negotiate any specific clauses to ensure alignment with District policy and Louisiana State Law. Substitute the Proposer's language with the District's standard professional services terms.

(#10) Credentials and Compliance: Mandatory Documentation (5 points)

To ensure full compliance with the Louisiana Department of Insurance (LDI), all Proposers must demonstrate that they, and any partner firms, are properly licensed to conduct business within the State of Louisiana.

The Proposer must provide current, legible copies of all professional licenses issued by the State of Louisiana. If the Proposer intends to utilize any third-party partners or sub-contractors to fulfill the Scope of Work, copies of those entities' licenses must also be included within this proposal. All licensing *must be active and in good standing* at the time of RFP submission. Points will be awarded based on the comprehensiveness of the firm's regulatory standing:

- **Comprehensive Compliance**: Active and in good standing valid Broker and Third-Party Administrator (TPA) licenses provide: **5 Points**
 - **Non-Compliant**: No valid Louisiana licensure provided: **0 Points**
-

(#11) Credentials and Compliance: Historical Track Record (5 points)

To protect the integrity of the District's benefit programs, the Proposer must provide a full disclosure of their regulatory track record. This includes any actions taken against the proposing entity or its parent corporation by any state or federal licensing board, regulatory agency, or professional association.

The Proposer must provide a detailed list of all citations, fines, disciplinary actions, or consent decrees that are currently pending or have been resolved within the past five (5) years (measured

from the issuance date of this RFP).

If no such actions exist, the Proposer must provide a formal statement on company letterhead certifying a "Clean Regulatory Record."

- **Pristine Record:** 0 Citations / Disciplinary Actions: **5 Points**
 - **Minor History:** 1 Citation / Disciplinary Action: **4 Points**
 - **Moderate History:** 2 Citations / Disciplinary Actions: **2 Points**
 - **Significant History:** 3 or More Citations / Disciplinary Actions: **0 Points**
-

(#12) Litigation and Legal: History (4 points)

The Lafayette Parish School System prioritizes partnerships with firms that maintain a record of contractual integrity and professional stability. The Proposer must disclose all relevant legal proceedings involving the proposing entity or its parent firm.

Proposers must provide a summary of any civil litigation, arbitrations, or breach of contract claims related to the delivery of insurance or administrative services that are currently pending or have been resolved within the past five (5) years.

This includes:

- Lawsuits filed by clients (public or private).
 - Litigation regarding data breaches or errors and omissions (E&O).
 - Contractual disputes that resulted in formal legal filings.
 - 0 Citations = **4 points**
 - 1 Citations = **3 points**
 - 2 Citations = **2 points**
 - 3 > Citations = **0 points**
-

(#13) Litigation and Legal: Disclosures (4 points)

The Proposer must provide a comprehensive list of all pending or resolved legal actions filed against the company, its subsidiaries, or its parent firm within the past five (5) years. This requirement applies to any legal matter related to the administration or sale of Voluntary Benefits and includes:

- Lawsuits involving breach of contract, errors and omissions (E&O), or fiduciary negligence.
 - Any proceedings involving the firm or its principals.
 - Proceedings initiated by state or federal regulatory bodies (e.g., Department of Insurance, Department of Labor).
 - 0 Lawsuits = **4 points**
 - 1 Lawsuit = **3 points**
 - 2 Lawsuits = **2 points**
 - 3 > Lawsuits = **0 points**
-

(#14) Litigation and Legal: Mandatory Disclosure of Terminated Accounts (4 Points)

The Proposer must provide a comprehensive list of all clients who have canceled or failed to renew their contracts for Voluntary Benefit or Administrative Services within the **past five (5) years**.

For each terminated account, the Proposer must provide:

- Name of the organization and the total number of employees/members serviced.
 - A transparent explanation of why the contract ended (e.g., end of contract term, change in broker/carrier, client merger, or termination for cause).
 - A point of contact at the former client organization (Name, Title, Telephone, and Email) whom the District may contact for a performance
 - 0 Contracts lost/terminated = **4 points**
 - 1 Contract lost/terminated = **3 points**
 - 2 Contracts lost/terminated = **2 points**
 - 3 > Contracts lost/terminated = **0 points**
-

(#15) Regulatory Compliance: Data Privacy and HIPAA Standards (1 Point)

Provide a detailed narrative of the specific administrative, physical, and technical safeguards your firm has implemented to ensure full HIPAA (Health Insurance Portability & Accountability Act) compliance. Responses must address data encryption (at rest and in transit), employee privacy training, and your internal audit process for identifying potential security vulnerabilities.

(#16) Regulatory Compliance: Legislative and Regulatory Monitoring (1 Point)

Describe your organization's internal process for monitoring and communicating changes in federal and/or Louisiana state laws (e.g., ACA updates, IRS changes to Section 125, or state-specific insurance mandates). Responses must address how your organization proactively notifies the Lafayette Parish School System of these changes and how you assist in adapting District workflows to maintain compliance.

(#17) Regulatory Compliance: Background Checks (2 Points)

To ensure the safety and integrity of District employees and students, the Proposer must maintain strict vetting standards for all Benefit Consultants and field staff.

- Does your organization conduct comprehensive criminal background checks and professional licensing verifications on all Benefit Consultants before they are assigned to an account? **Yes: (1 Point) | No: (0 Points)**
 - How often are these background checks refreshed for active employees?
 - **Annually: (1 Point) | Less Frequently/Never: (0 Points)**
-

(#18) Administrative Services: Section 125 / Cafeteria Plan / FSA (2 points)

The Lafayette Parish School System requires comprehensive administration for its Section 125 Cafeteria Plan, specifically encompassing all Flexible Spending Accounts (FSA).

Please specify the delivery model for your FSA administration services:

- **In-House Administration (2 Points):** The Proposer manages all claims, adjudications, and reimbursements directly through their own proprietary systems and staff.
 - **Contracted/Outsourced Service (1 Point):** The Proposer utilizes a third-party partner or sub-contractor for FSA administration.
 - *Note: If contracting out, the Proposer must identify the partner firm and provide their active Louisiana TPA license number.*
-

(#19) Administrative Services: Proven Experience in FSA Management (1 point)

State the total number of years your company has continuously provided Section 125 and FSA administration. The District requires high-touch support for employees managing pre-tax dollars. Do you provide dedicated customer service support specifically for FSA participants via live telephone, United States Postal Service, and monitored email channels?

- **Yes (1 Point):** Support is available via all channels.
 - **No (0 Points):** One or more channels are unavailable.
-

(#20) Administrative Services: COBRA (2 Points)

Does your company directly provide and manage the entire COBRA lifecycle in-house (including initial notifications, qualifying event notices, and enrollment processing), or is any portion of these services contracted out to a TPA? Please specify your delivery model.

- Company Provides = **2 points**
 - Contracts Out = **1 point**
-

(#21) Administrative Services: COBRA (4 Points)

State the total number of years your company has been a direct provider of COBRA administration services.

- 1 to 5 years = **1 point**
 - 6 to 10 years = **2 points**
 - 11 to 15 years = **3 points**
 - 16 + years = **4 points**
-

(#22) Administrative Services: Portability (2 Points)

Define the portability status of all proposed voluntary benefits. For each plan offered, confirm if a member can maintain coverage independently upon leaving the group. Your response must indicate if:

- All proposed benefits are fully portable = **2 points**
 - A mixture of portable and non-portable benefits are proposed = **1 point**
 - None of the benefits are portable = **0 points**
-

(#23) Administrative Services: Guaranteed Issue (2 Points)

Confirm the Guarantee Issue (GI) status for all proposed voluntary benefit products. Based on the definition that GI coverage is issued regardless of medical history with no health questions asked, does your proposal meet this criteria? *Please provide a list identifying which specific products fall into each category.*

- Yes, **all** proposed products are 100% Guaranteed Issue. **(2 Points)**
 - **Some** products are Guaranteed Issue, while others require EOI. **(1 Point)**
 - **No** products are Guaranteed Issue. **(0 Points)**
-

(#24) Administrative Services: Claims Administration (2 Points)

Does your company provide direct, hands-on assistance to employees for filing voluntary benefit claims? Please specify if this support is managed by your own internal staff **(2 points)** or if you contract out this advocacy to a TPA or the insurance carrier's call center **(1 point)**.

(#25) Administrative Services: Survey (1 Point)

Does your company conduct employee satisfaction surveys specifically for members enrolled in voluntary benefits?

- To receive **1 point**, you must attach a copy of a recent satisfaction survey that includes both the **original questions** and the **analytical response summaries** (data/charts) from the respondents.
 - Failure to provide the analytics or the survey example will result in **0 points**.
-

(#26) Communication Support: Benefits Booklet (2 Points)

Describe your process for delivering Benefits Booklets to employees. Please confirm that your service includes the design and distribution of these booklets in both printed and online versions for New Hires and Open Enrollment periods. *Note: Providing only one format (e.g., digital only) or failing to provide this service will result in 0 points.*

- Digital and Print = **2 points**
 - Digital or Print = **0 points**
-

(#27) Communications Support: Benefits Booklet (2 Points)

Please attach a complete sample of your informational Benefits Booklet as used for New Hire and Open Enrollment. The document must demonstrate your ability to communicate complex voluntary benefits in a clear, employee-friendly format.

- Benefits Booklet attached = **2 points**
 - No Sample provided = **0 points**
-

(#28) Communications Support: Benefits Website (2 Points)

Does your company provide and maintain a dedicated, up-to-date website where employees can access their specific voluntary benefit details? *To receive 2 points*, the site must be updated in real-time or annually to reflect current plan designs, rates, and claim forms.

- Yes, we provide and maintain this site in real time (**2 points**)
 - No, this service is not offered (**0 points**)
-

(#29) Communications Support: Benefits Videos (2 Points)

Does your company provide educational videos specifically designed to explain voluntary benefits for both New Hire onboarding and annual Open Enrollment?

- **2 Points:** Offered. Provides details of their library of videos or custom-produced content that explains benefit opportunities, "how they work" scenarios, and enrollment instructions.
 - **0 Points:** Not Offered. Cannot deliver educational video support.
-

(#30) Communications Support: Local Office (1 Point)

Does your firm operate a local office in Lafayette, Louisiana that will be staffed with representatives authorized to assist employees with voluntary benefit claims, enrollment, and plan education?

(Note: To receive **1 point**, the bidder must provide the local office address, the number authorized to assist with voluntary benefits and confirm that it is available for walk-in or scheduled employee assistance. If no physical office exists in Lafayette, **0 points**.)

- Yes = **1 point**
 - No = **0 points**
-

(#31) Communications Support: Local Office (3 Points)

State the total number of full-time employees (W-2) physically based at your Lafayette, Louisiana office location. To assess your local support capacity, please provide the headcount of staff working on-site at your Lafayette facility who are authorized to support our members.

- 1 - 5 employees = **1 point**
 - 6 - 15 employees = **2 points**
 - 16+ = **3 points**
-

(#32) Communications Support: Availability for Consult (2 Points)

Will the Proposer commit to providing formal presentations and answering technical inquiries, when requested, to the following bodies: the Lafayette Parish School Board (LPSB), the Superintendent and Staff, the Board Insurance Committee (BIC), and the Employee Retiree Insurance Advisory Panel (ERIAP).

- Yes, we can commit to this request = **2 points**
 - No, we cannot commit to this request = **0 points**
-

(#33) Communications Support: Member Communications (3 Points)

Provide a detailed Communications and Marketing Plan for the 60-day period leading up to Open Enrollment. Specifically, describe the multi-channel strategies (digital, print, and on-site) you will use to notify members of the enrollment window and educate them on the value of voluntary benefits. Include your approach for engaging 'hard-to-reach' employees, such as bus drivers and food service staff, who lack consistent computer access.

- **3 Points:** Response includes a timeline; demonstrates a clear approach (Home mail, SMS, Email, and Signage); and provides an actionable strategy for "deskless" workers.
 - **2 Points:** Response provides a general list of materials but lacks a clear 60-day timeline or fails to address the unique needs of bus drivers/field staff.
 - **1 Point:** Response is generic (e.g., "We will send emails and posters") with no customization for a school district environment.
-

(#34) Enrollment Services: Open Enrollment (2 Points)

Please provide a detailed Staffing and Deployment Plan that demonstrates your capacity to provide one-on-one, in-person enrollment assistance. To receive full points (**2 points**), your response must include the following two components:

1. **Dedicated On-Site Personnel:** State the exact number of dedicated on-site consultants that will be assigned to this account in order to support the expectations outlined within this RFP. *(Note: These must be internal staff to receive the maximum score, not contracted).*
 2. **Make-Up Session Strategy:** Detail your specific protocol for servicing employees who are absent during their school's scheduled session or who work non-traditional hours (e.g., bus drivers, food service).
-

(#35) Enrollment Services: Open Enrollment (2 Points)

Will it be necessary for your organization to hire additional staff or increase your current headcount in order to fulfill the obligations and service requirements outlined in this RFP (including the 5-week Open Enrollment and year-round support)?

- Company can fulfill obligations now = **2 points**
 - Would need to Contract Out = **1 point**
-

(#36) Enrollment Services:Benefit Admin System Access (2 Points)

For the purpose of offering additional customer service support to our employees and retirees, will the LPSS Insurance & Benefits Department have access to the Voluntary BenAdmin System?

- Yes = **2 points**
 - No = **0 points**
-

(#37) Billing Services: Reconciliation (2 Points)

Does your platform support monthly billing reconciliation to handle adjustments and corrections before payroll is finalized?

- Yes = **2 points**
 - No = **0 points**
-

(#38) Billing Services: Reconciliation (2 Points)

Does your firm provide vendor advocacy services to resolve billing discrepancies directly with our providers on behalf of LPSS?

- Yes = **2 points**
 - No = **0 points**
-

(#39) Billing Services: Fees (2 Points)

Beyond the base premiums, are there any additional administrative fees, setup costs, or service charges billed to either the employer or the employee for these voluntary benefits?

- Yes = **0 points**
 - No = **2 points**
-

(#40) Retiree Services: Customer Service & Administrative Support (2 Points)

The Lafayette Parish School System (LPSS) requires a high-touch, "concierge-style" support model for retirees. The successful proposer must manage the end-to-end lifecycle of benefit portability, ensuring no lapse in coverage or communication during the transition from active employment.

One-on-One 'Retirement Transition' Counseling. The proposer shall provide dedicated administrative and consultative support for all voluntary programs offering portability.

- Facilitating individual "Retirement Transition" sessions to provide expert guidance on maintaining voluntary benefits post retirement via a call center, in-person or through group presentations.
 - Work alongside the retiree offering guidance for all portability forms.
 - Providing retirees with clear, written instructions regarding post-termination premium payment timelines.
 - Act as the primary liaison between the retiree and the carrier to resolve complex claims issues post-separation.
 - Manage all policy cancellations ensuring prompt notification is sent to both the retiree and the District.
 - Can meet expectations for delivering these services = **2 points**
 - Does not offer this service = **0 points**
-

(#41) Retiree Services: Death Claims Administration and Support Services (2 Points)

The successful proposer shall provide comprehensive, high-touch support to beneficiaries during the life insurance claims process and will act as the primary intermediary to expedite claims submission, approval and benefit payout.

- Verify beneficiary designations, assisting families with the accurate completion of claim forms, and acting as a liaison with carriers to resolve any processing delays or documentation discrepancies. Act as the primary intermediary to expedite claim approval and benefit payout.
 - Can meet expectations for delivering these services = **2 points**
 - Does not offer this service = **0 points**
-

(#42) Retiree Services: LPSS Employer Paid Benefit (2 Points)

LPSS currently provides a \$5k Life and AD&D benefit to its retirees as a District paid offering. Given the rising costs associated with aging populations and shifting insurance markets, the proposer must provide a detailed strategy for benchmarking this benefit against the current market.

- Describe your methodology for comparing coverage against other Louisiana school districts and public sector entities of similar size.
 - How often do you recommend a formal market check for this specific benefit line?
 - Describe your ability to secure competitive quotes from top-tier (A-rated) vendors.
 - Describe how you'd leverage your firm's total book of business to negotiate pricing.
 - Fully described their processes and methods = **2 points**
 - Answers are vague and non-descriptive = **0 points**
-

Selection Process

Upon the closing of the RFP, all timely submissions will be audited for their responsiveness and evaluated by an RFP Selection Committee appointed by the Superintendent.

The evaluation and selection of a provider for Voluntary Benefits and Administrative Services will follow a structured multi-stage process:

- **Initial Ranking:** Proposals are evaluated and ranked according to the Evaluation and Selection Criteria section.
- **Highest Ranking:** The RFP Selection Committee will identify the top three highest-ranking Administrator / Broker and submit their findings to the Superintendent.
- **BIC Committee Presentation:** Upon notification, the top-three highest-ranking proposers must be prepared to present to the Board Insurance Committee (BIC).
- **Final Recommendation & Award:** The Board Insurance Committee (BIC) will provide its recommendation to the LPSB. Final authority for the contract award rests solely with the full Board.

Exhibit A: Addenda Acknowledgment Form

Lafayette Parish School System

RFP# 07-27

Project Title: Voluntary Benefits and Administrative Services

Mailing & Labeling Instructions

To ensure proper handling and to prevent accidental early opening, all proposal envelopes or packages must be clearly marked on the exterior as follows:

RFP# 07-27: Voluntary Benefits and Administrative Services

Submission Deadline: **July 28, 2026, at 4:00 PM CST**

Acknowledgment of Addenda

The undersigned Proposer hereby acknowledges receipt of the following Addenda issued by the LPSS. It is the responsibility of the Proposer to ensure all issued Addenda have been received and incorporated into the final proposal.

Addendum No.	Date Received	Addendum No.	Date Received
No. 1	_____	No. 3	_____
No. 2	_____	No. 4	_____

Proposal in the event any addenda are issued. If no addenda are issued, this form need not be included with the proposal.

Name of Firm

Name & Signature of Proposer

Telephone Number

Email Address

Exhibit B: Intent to Submit a Proposal

Lafayette Parish School System

RFP# 07-27

Project Title: Voluntary Benefits and Administrative Services

This document serves as formal verification that the firm listed below intends to submit a professional proposal in response to the aforementioned RFP. By submitting this form, the Proposer ensures they will be included in the official distribution list for any future addenda, Q&A documents, or schedule revisions.

Proposer Information

Legal Name of Firm: _____

Primary Contact Person: _____

Title: _____

Telephone Number: _____

Email Address: _____

Estimated Method of Delivery: ☐ Electronic Submission ☐ Physical / Courier

Authorized Acknowledgment

By signing below, the Proposer acknowledges the timeline and requirements set forth in the RFP and expresses a bona fide intent to participate in the competitive bidding process.

Signature: _____ **Date:** _____

Mandatory Form Return: Submit this form to Kristie Sam, Purchasing and Procurement Coordinator at kpsam@lpssonline.com no later than **July 6, 2026 at 8:00 AM**.

Exhibit C: Open Enrollment Operational Requirements

The selected successful proposer must provide a comprehensive, on-site enrollment strategy tailored to the size and geographic distribution of the Lafayette Parish School System.

District Profile & Enrollment Window

- Five (5) weeks, scheduled mid-September through mid-October (dates subject to change).
- Approximately 4,300 active full-time employees.
- The TPA is responsible for servicing 46 District locations, including schools, administrative offices, and support facilities.

The District mandates a "High-Touch" enrollment model. The TPA is required to provide.

- **Scope of Work:** It is the expectation that the SOW, outlined within this RFP, will be fulfilled.
- **One-on-One Consultations:** Mandatory face-to-face meetings for all eligible employees during the enrollment window.
- **Multi-modal Enrollment:** Through a secure, user-friendly web portal for online self-service enrollment, from licensed benefit counselors and through a dedicated call center.
- **Staffing Levels:** The successful proposer must deploy a sufficient number of licensed benefit consultants per location to accommodate the specific headcount of each site.
- **On-Campus Duration:** Consultants are expected to be on-site from the beginning of school until the end of day. Larger campuses will require multiple consecutive days.
- **"Catch-Up" Days:** To ensure 100% engagement, the TPA must schedule supplemental "Catch-Up" sessions at the District Office for employees who were absent during their specific campus window.

Financial Obligations: To minimize classroom disruption, the *TPA is required to absorb the full cost of substitute teachers* needed to release instructional staff for their individual benefit consultations. Proposers should factor these administrative costs into their overall pricing model.

Implementation Timeline & Initial Commitment. The successful proposer must be prepared for an accelerated implementation. Although the formal contract begins January 1, 2027, the successful proposer is contractually obligated to execute the 2027 Annual Open Enrollment during the period of September through October 2026 (dates are subject to change).

Current Staffing Per Location (*)

Acadiana HS – 138	L.Leo Judice ES - 37
Acadian MS – 50	Lafayette HS - 168
Alice Boucher ES – 63	Lafayette ES - 66
Broadmoor ES – 110	Lerosen Preparatory - 67
Broussard MS – 68	Live Oak ES - 80
Carencro Bob Lilly ES – 100	Martial Billeaud ES - 66
Carencro HS – 110	Milton ES / MS - 112
Carencro MS – 72	Myrtle Place ES - 46
Charles Burke ES – 81	Northside HS - 80
Cpl. Michael Middlebrook ES – 74	Ossun ES - 60
David Thibodeaux STEM – 102	Ovey Comeaux HS - 84
District Office & Annex - 962	Paul Breaux MS - 47
Dr. Raphael Barranco ES – 54	Prairie ES - 87
Duson ES – 35	Ridge ES - 70
Early College Academy – 12	S.J. Montgomery ES – 100
Edgar Martin MS – 75	Scott MS – 73
E.J. Sam Accelerated – 16	Southside HS – 132
Ernest Gallet Elementary – 92	Truman Early Childhood – 89
Evangeline ES – 79	W.D. Baker Smith Career Center – 35
Green T. Lindon ES – 97	Westside ES - 73
J.W. Faulk ES – 60	Woodvale ES - 95
J. Wallace James ES – 86	Youngsville MS - 56
Judice MS – 51	
Katharine Drexel ES - 48	
L.J. Alleman MS - 90	

(*) LPSS is currently evaluating personnel requirements for the next academic school year and as a result staffing levels and locations may change.