

**Request for Proposal
RFP#2425-072
For Healthcare Consultant**

**For the Pennsbury School District
For the 2024-25
(With option to extend 2 additional years)
Fiscal Year**

Completed Proposal is due by
May 3, 2024 by 3 PM
Pennsbury School District
Attn: Chris Berdnik, CFO
134 Yardley Avenue
Fallsington, PA 19054
cberdnik@pennsburysd.org

SECTION I – INTRODUCTION

INVITATION FOR PROPOSAL

Pennsbury School District (the “District”) is soliciting written proposals from interested healthcare consulting firms known to provide such services to Pennsylvania school districts. Firms wishing to be considered should send a letter of interest, a history of their firm and résumé of the personnel that would be responsible for providing audit services to the District, a listing of school district references, information that addresses the items that will be used as selection criteria and the last page of this document to the Pennsbury School District by May 3, 2024. Proposals should be addressed to Chris Berdnik, PCSBA, Chief Financial Officer, Pennsbury School District, 134 Yardley Avenue Fallsington PA 19054, with notation on the outside of the envelope that it contains an “Healthcare Consultant Proposal”.

A committee will review the proposals and present the selected firm to the Finance Committee at their meeting scheduled for May 9, 2024. The District Administration anticipates that the School Board will approve an agreement for consulting services at the School Board meeting scheduled on May 16, 2024. The District reserves the right to reject any and or all proposals and to waive, at its discretion, any irregularities, mistakes, omissions, or informalities relative thereto.

DISTRICT BACKGROUND

The Pennsbury School District is a local governmental unit created by the Commonwealth of Pennsylvania to provide education services to approximately 10,000 students living within a community of approximately 73,000 residents Falls, Lower Makefield, Yardley Borough and Tullytown Borough. The District has 10 elementary schools, three middle schools, one high school across two campuses and an academy encompassing grades K- 12. The District’s 2023-24 expenditure budget is \$243.6 million. The Board of School Directors governs the District. The Board meets monthly, generally on the third Thursday of each month, to conduct that month’s business agenda.

The District joined the Delaware Valley Health Trust in 2022-23. We seek a partner to guide our future state, whether that be to remain with DVHT, move to another trust (Bucks and Montgomery County Schools Consortium), or return to stand-alone self-insured status.

TERM OF AGREEMENT

The District is seeking a proposal for healthcare consulting services for a one year period of time. The 2025-26 and 2026-27 fiscal years are optional at the Pennsbury School District’s discretion, subject to annual termination if notification is provided at least ninety days prior to the fiscal year end.

MINIMUM REQUIREMENTS

- + Must have a minimum of ten years’ experience in benefits consulting.
- + Must be eligible to become a broker of record through the Districts insurance carriers.
- + Must hold all licenses and certifications required by law to perform the services that are subject of this RFP.

SELECTION CRITERIA

The District will evaluate firms based on the following criteria:

- + Firm's history and related experience with Pennsylvania school districts.
- + Firm's personnel and qualifications; and, identification of those individuals who will be responsible for handling/servicing the account.
 - Firm must possess the proficiency to provide the services requested herein.
 - Firm must have credible experience with at least one current school district client.
 - Firm must not have any obligations or interests that conflict with the best interests of Pennsbury School District.
- + References from other Pennsylvania school districts. Three references with the name and phone number of the school district business manager or equivalent position should be provided.
- + Proposed fees annually and throughout the proposed engagement period.

TERMS AND CONDITIONS

Please be aware that this is a request for professional services, and not a competitive bid. The District is not required to conduct its request for professional services in accordance with competitive bidding laws. The District will not be liable for any cost(s) incurred by firms prior to the issuance of a signed engagement letter.

SECTION II – SCOPE OF WORK

This section describes the services the District is soliciting from a consulting firm.

GENERAL HEALTHCARE CONSULTING SERVICES

The firm will provide plan consulting for the Districts medical, prescription and dental plans to include, but not limited to:

- + Benefit Planning
- + Benefit Plan Design and Cost Analysis of plan changes
- + Summary Plan Description Compliance
- + Review of claim experience under medical, RX and dental
- + Contract renewals for medical, RX and dental
- + Assist with benefit issues during Collective Bargaining Negotiations
- + Budget and Forecasting Preparation
- + Analysis of current benefits environment including review of local and national trends in benefits and healthcare reform
- + Monitoring of claims services and claims issue resolution
- + Provide support in the development of employee communications materials
- + Medical stop loss contract negotiations
- + Self-insured health care pricing including:
 1. COBRA rate development
 2. Contribution analysis
 3. Compliance analysis

4. Medical plan network discount analysis, network access and penetration, hospital claims reporting
5. Medical plan evaluation of medical management criteria (high cost claimant management services, capitated services, critical care management assessment)

SECTION III – PROPOSAL INSTRUCTIONS

RESPONSE TO PROPOSAL

A complete response to this request for proposal is required. A valid response will consist of:

- + Completed transmittal forms (last two pages of this document).
 - + A letter of interest describing the firm’s understanding of the scope of work and committing to completion of the work within the District’s timetable.
 - + A history of the firm noting its experience with Pennsylvania school districts, size and structure,
 - + Résumés of the personnel that would be responsible for servicing the District.
 - + A listing of school district references including contact information, type of services performed and the length of service with each school district.
 - + Detail of the firm’s approach to the work, including the type of software program used; use of statistical sampling; estimate of total job hours.
- + Fixed fee quote for the engagement found on the last page of this document. The fee structure should include the cost of performing the services outlined in this request for proposal for the years 2024-25, 2025-26, and 2026-27.

It should be noted that this solicitation process may not necessarily result in a change in consulting firm. After the Pennsbury School District has reviewed all responses, the Finance Committee of the District may request that a formal presentation be made.

SECTION IV – OTHER INFORMATION

COSTS RELATED TO A RESPONSE TO THIS PROPOSAL

The District will not be liable for any cost incurred in preparation of a response to this proposal. The District reserves the right to conduct interviews of any or all firms submitting proposals prior to selection. The District will not be liable for any costs incurred by the firm in connection with such interview.

RESPONSIVE PROPOSAL

Submission of a proposal will be prima facie evidence that the firm submitting the proposal has full knowledge of the scope, nature, quantity and quality of work to be performed; the detailed requirements of the specifications; and the conditions under which the work is to be performed.

FEE NEGOTIATION

The District reserves the right to conduct pre-contract negotiations with any potential firms that have submitted proposals.

DISTRICT'S RIGHTS IN SOLICITATION

The District reserves the right to reject any and all proposals. The District retains sole discretion to accept the proposal it considers most favorable to its interests, and the right to waive minor irregularities in the proposals. The District further reserves the right to reject all proposals and seek new proposals when such process is in the best interest of the District.

ETHICS AND COLLUSION

This request for proposal is not subject to bidding requirements; however, the District intends to adhere to the following guidelines:

Bribery: Any person that attempts to influence a District official to designate such person's firm as the auditor by promising to provide or by providing to such District official any gratuity, entertainment, commission or any other gift, in exchange for a promise to designate that firm shall be disqualified from further consideration and shall be subject to any applicable penalties under the law.

Conflict of Interest: Any firm that knows of any District official having a material direct or indirect financial interest in such firm shall be required to submit a written statement detailing such interest. Failure to disclose a known financial interest shall result in the firm's disqualification from further consideration.

**THIS PROPOSAL
MUST BE RECEIVED IN THE
Pennsbury School District Administration Office BY
May 3, 2024 3 PM**

TO THE ATTENTION OF:

Chris Berdnik, PCSBA
Chief Financial Officer
Pennsbury School District
134 Yardley Avenue
Fallsington, PA 19058
cberdnik@pennsburysd.org

NAME OF FIRM/AGENCY: _____

CONTACT PERSON: _____

STREET ADDRESS: _____

CITY/STATE/ZIP: _____

TELEPHONE NUMBER: _____

FAX NUMBER: _____

E-MAIL ADDRESS: _____

NOTE: Return this form as the COVER PAGE of your Proposal.

Request for Proposal for Healthcare Consulting Services

The Consulting Firm's staffing fee structure, hourly rates and other costs will be as follows:

The Consulting Firm agrees to do the consulting services for the amounts quoted below as follows:

Consulting Services for May 17, 2024 to June 30, 2024	\$ _____
Consulting Services for 2024-2025	\$ _____
Consulting Services for 2025-2026*	\$ _____
Consulting Services for 2026-2027*	\$ _____

Signature _____

Title _____

Date _____

*The Pennsbury School District maintains sole discretion to extend this contract and all of these provisions as it may see fit, subject only to price adjustment.