



Request for Proposals for Employee Benefit Broker

The Avondale Education Association, Inc. (AEA), a non-profit corporation in Georgia d/b/a The Museum School of Avondale Estates, is seeking qualified brokers to submit proposals for a comprehensive employee benefit package for The Museum School of Avondale Estates. The contract will have an initial annual renewal option (at the sole discretion of the AEA) for a three-year period.

The Museum School of Avondale Estates is a locally-authorized charter school commissioned by the DeKalb County School District in agreement with the Avondale Education Association. The school opened its doors to Kindergarten through 3rd grade students for the first time on August 9, 2010, and currently serves Kindergarten through 8th grade students. Student enrollment for the 2018-2019 year will be 590 students. There will be 70 full-time employees eligible to receive benefits.

Our Request:

We require a comprehensive benefit package for the full-time employees of The Museum of School of Avondale Estates, effective beginning September 1, 2018 until August 31, 2019.

The benefit package shall include at least health, dental, vision, short-term disability, long-term disability, and life insurance benefits. The broker is invited to suggest other creative offerings, such as FSA, HSA, and additional retirement savings opportunities.

The Principal and other members of the Board Personnel Committee, will be made available to assist in answering any benefit-related questions. Benefit proposals must be complete for presentation to the Personnel Committee and to the Board in April 2018 for approval. Anticipated start date for benefit package is September 1, 2018. The Museum School of Avondale Estates does not discriminate according to sex, race, age, or other factors prohibited by law. Proposals may be subject to the Open Records act and other applicable laws.

Vendor Requirements:

- ✓✓ Licensed in the state of Georgia
- ✓✓ Non-profit experience
- ✓✓ Experience with schools, ideally charter schools
- ✓✓ Experience with state or quasi-governmental agencies
- ✓✓ Experience with small organizations
- ✓✓ Benefit offerings must comply with all applicable state and federal regulations

Any potential conflict of interest with the Avondale Education Association/The Museum School of Avondale Estates must be fully disclosed by the vendor.

Timeline:

- ✓✓ Broker presentation of proposal to Personnel Committee – March 2018
- ✓✓ Personnel Committee Board of Directors – April 2018
- ✓✓ Benefit plan effective date – September 1, 2018

Proposals:

Proposals are to be kept confidential, and will not be used for advertisement or any purpose without express permission of The AEA; only the AEA and its assigns are authorized to release information about the submissions to the media. All costs associated with creating and submitting proposals will be borne by the applying broker.

Proposals will be evaluated based on the following criteria:

- ✓✓ Charter School experience
- ✓✓ Customer Service Commitment/Response time
- ✓✓ Availability/Access to primary agent
- ✓✓ Approach to employee service for benefits events/changes
- ✓✓ Agent compensation/Commission structure
- ✓✓ Access to diverse portfolio of products/flexibility
- ✓✓ Annual Review process, focusing on provision of strategic, cost-effective advice
- ✓✓ Consideration of references, to be checked by Personnel Committee

Proposals should be drafted in Microsoft Word. Within your proposal please include:

- ✓✓ Customer Service Commitment/Response time
- ✓✓ Availability/Access to Primary Broker
- ✓✓ Description of approach to employee service for benefits events/changes
- ✓✓ Broker Compensation/Commission disclosure
- ✓✓ Description of portfolio of products
- ✓✓ Description of Annual Review process
- ✓✓ Contact Person and Contact Information
- ✓✓ Experience and qualifications, focusing on nonprofit, public sector and Charter School experience
- ✓✓ Proposal Details and Price
- ✓✓ List of Deliverables
- ✓✓ At least three references with whom the broker has worked for at least one complete benefit cycle (including renewal)
- ✓✓ Certification that you will comply with the above requirements.

Hard copy proposals are due on **February 5, 2018** by 5:00 p.m. EDT. All questions must be submitted via email to Katherine.kelbaugh@themuseumschool.org or by phone (404) 289-0320. The deadline for vendors to submit questions is Monday, January 29 at 5:00 p.m. EDT.

An electronic copy of the proposal shall be emailed to Katherine Kelbaugh at Katherine.kelbaugh@themuseumschool.org. Additionally, five (5) copies of the proposal shall be delivered to:

The Museum School of Avondale Estates
Attn: Benefits
923 Forrest Boulevard
Decatur, GA 30030

The time process for vendor selection shall be as follows:

RFP issued	January 8, 2018
Vendor Question deadline	January 29, 2018 5:00 PM
Proposals Due	February 5, 2018 5:00 PM
Vendor Selection	April 2018

The Vendor will be selected based upon the vendor's experience, capabilities, ability to meet the project schedule and price.

Payment will be made with payment terms of net 30 days upon completion of employee enrollment.

We look forward to your response.

Sincerely,

Katherine Kelbaugh, Principal
Phone: (404) 289-0320
Avondale Education Association d/b/a
The Museum School of Avondale Estates
<http://www.themuseumschool.org>