

INSERT CREDIT UNION LOGO HERE

REQUEST FOR PROPOSAL
Employee Benefits Brokerage and Consulting Services
[Credit Union]

Select Invitation

[Credit Union] is seeking a benefits brokerage/consulting firm to perform the full range of services related to the design, implementation, maintenance and improvement of [Credit Union] employee benefits insurance programs.

You are one of [Number] companies we are inviting to submit a condensed proposal which will be accepted until [Date]. Proposals should be addressed to:

[RFP Recipient, Title]
[Credit Union]
[Physical Address]
[E-mail Address]

(Please provide a copy via electronic pdf)

RFP Schedule

Activity	Date
Condensed RFP Distribution	
Condensed RFP Responses Due	
Proposal Review	
Conduct Interviews with Selected Finalists	
Select Broker / Consultant	
Relationship Effective Date	

Background of [Credit Union]

Scope of Services

[Credit Union] is looking for a consultant partner that can provide professional, highly qualified benefits guidance and services.

Questionnaire

Your Practice

1. Describe what makes your firm uniquely qualified to work on our account.
2. Provide an example of how you are personally taking a leadership role within the industry.
3. What resources do you have for employee communication and engagement throughout the course of the year?

Expertise

4. What are your top three cost containment strategies?
5. Health insurance costs are doubling every 7 – 10 years, what is your plan for stopping this trend?
6. What strategies do you use to control the number, frequency, and severity of claims?
7. Please explain your process for determining what risks we face?
8. How do you determine suitability of products?

Special Services

9. How much time will you allocate to our account on a monthly basis for:
 - Strategy and Implementation?
 - Account Service?

Corporate Wellness

10. Describe what innovative ways you are helping employers move beyond the “normal” wellness initiatives known today.

Compensation

11. How are you compensated?
12. Do you work on a performance basis?
13. Will you sign a compensation disclosure form?
14. Provide three references. For each, reference please include:
 - Number of employees
 - Number/type of plans
 - Length of servicing relationship
 - Contact name, title, and phone number