

RFP

Consultant's Highlights

		CAPFI	SUSAN POSADA, Inc	CBIZ	THE MAHONEY GROUP
Cost		\$4700 monthly / \$56,400 annually	\$132,720 annually (\$32 per employee per month for medical + \$7.50 PEPM for other ancillary benefits)	Years 1 & 2 \$96,000 Years 3 & 4 \$102,000 Year 5 \$108,000	\$120,000 annually (\$35 PEPM for medical)
Additional Costs		N/A - No additional costs	\$225 per hour	Hourly rate: Year 1 & 2 \$250/hr. - Consultant \$175/hr. - Support Staff Year 3 & 4 \$265/hr. - Consultant \$185/hr. - Support Staff Year 5 \$280/hr. - Consultant \$195/hr. - Support Staff per hour	Does not charge on an hourly basis. Additional projects (not in the scope of services) would be based on an agreed fee before work is done.
Experience with:		Self-Funded Plans Mexico Network 45 Public sector clients Mainly School Districts	Self-Funded Plans Mexico Network 2 Gov clients Employee Benefit Trusts	Self-Funded Plans Mexico Network 25 Public Sector Clients (10 Local Gov. agencies) Employee Benefits Trusts	Self-Funded Plans Mexico Network 48 Self-Funded Clients (27 Gov. clients)
Accessibility	Team	<p>Rob Brooks – Managing Partner. 22 years of experience in the industry. Reviews and analyzes benefits programs, negotiates carrier agreements and renewals.</p> <p>Jared Hancock – Partner. 27+ years serving in the self-funded health insurance area.</p> <p>Allison Parks – Senior Account Executive. Reviews and analyzes employee benefit programs, negotiates carrier agreements and renewals.</p> <p>Capfi is comprised of 18 members.</p>	<p>Susan Posada – Consultant. Has been serving clients since 1996 in the employee benefits industry. Expertise in employee benefits, financial analysis, plan design & implementation, and communication strategies.</p> <p>Ken McDonald & Raquel Gustafson – Provide support as needed.</p>	<p>Oscar Diaz – Vice President of Business Development and Consultant. Joined CBIZ in 1998 and has an extensive background in providing consulting services.</p> <p>Jennifer Aragon – Account Executive since 2012. Has knowledge and expertise in fully insured, level-funded and self-funded medical, dental, life and disability benefit plan as well as knowledge of wellness programs, EAP’s, COBRA, FSA, HAS, and ACA employer requirements.</p> <p>Debbie Jamison – 24 years of experience in health insurance. Knowledgeable in fully insured and self-insured medical plan. Experience in providing employee education in English and Spanish.</p> <p>Cameron Dugan – Provides analytic support to all CBIZ self-funded, public sector and governmental clients. Provides customized client reports.</p> <p>Anisa Karczynski- Wellbeing and Engagement Account Executive. Works to develop and implement evidence-based strategies to build and maintain a culture of total wellbeing based on client needs.</p> <p>Angela Schlosser – Claim advocate. Works with insurance carriers, providers and collection agencies to resolve all medical, dental and vision related claims issues on behalf of the client.</p>	<p>Seth Knowlton – Team Lead. Licensed Benefits Advisor for nearly 20 years and has been part of the Mahoney Group for 3 years.</p> <p>Mary Ann Pascoe- Acct. Executive. Handles new and renewed contracts. 30+ years of exp. working with TPAs in self-funding, claims processing, account management. Length of service with agency: 3 years.</p> <p>Jason Adrade – Compliance Leader. Specializes in self-funded clients and drives risk management strategies.</p> <p>Tammy Gutierrez – Compliance Leader. 30 years of experience in the insurance industry. Knowledge in operations and management, designing and administration of cafeteria plan, and COBRA. 19 years working with firm.</p> <p>Maren Honey – Compliance Specialist. 13 years of experience in HR and Employee benefit. Provides guidance on regulatory compliance. 1 year with firm.</p> <p>Kevin Derby – Strategic Data Analyst. 5 years of exp. in employee benefit analytics and specializes in self-funded department. 1 year with firm.</p> <p>Jay Rodriguez – Benefit Advisor (located in Yuma). Knowledgeable of Mexico coverage and of the local community. Mr. Rodriguez has worked with COSL, City of Somerton, COY and Yuma County. Length of service with agency: 2 years.</p> <p>Alex Jacobi – Voluntary Benefits and Technology Advisor. Executes voluntary benefits and enrollment technology. 3 years with firm.</p>
	Information	<p>Market Analysis</p> <p>Actuarial and Data Analytics</p> <p>Customized Project Plan</p> <p>PPACA Updates and Advisory Resources</p> <p>PPACA Analysis Guide</p> <p>Employee Surveys</p> <p>Employee Videos and Communication</p>	<p>Regular review and Optimization Claims Management</p> <p>Compliance and Regulatory Updates</p> <p>Risk Mitigation Strategies</p> <p>Cost Containment</p> <p>Claims Data analysis</p> <p>Client & Employee Portal</p> <p>Newsletters</p> <p>On-site Open Enrollment meetings</p>	<p>Monthly medical, Rx, and Dental Financial Reports</p> <p>In-House Analytics and Actuarial team</p> <p>Annual Performance Review</p> <p>In-House Legislation team</p> <p>Compliance Newsletters and reminders</p> <p>Benefit Guides in English and Spanish</p> <p>Wellness Newsletters</p> <p>Open Enrollment Communication</p> <p>Open enrollment On-site meetings</p> <p>Trust Management Assistance</p>	<p>Data analytics team</p> <p>Provides tools and expertise in navigating ACA, ERISA, COBRA, and CAA</p> <p>Plan performance & Review</p> <p>Wellness Initiatives</p> <p>On-going support: Client services, Claim resolution, Compliance, Billing & Eligibility</p> <p>On-site meetings and employee education (English & Spanish).</p> <p>Benefit counselors for individual one-on-one employee meeting</p>
Cultural Sensitive		Has worked with agencies in Yuma Co. Familiar with Siarmed and International Medical Solutions (IMS)	Consultant has worked with agency for 10+ years Familiar with Siarmed Bilingual representative	Familiar with International Medical Solutions(IMS). Bilingual representatives Current Broker for City of Nogales, which offers a Mexico Plan (IMS)	Benefit Advisor assigned to Yuma Office Familiar with IMS Bilingual/Bicultural Representative
Start Date		As soon as the contract is awarded	As soon as the contract is awarded Current broker	As soon as the contract is awarded	As soon as the contract is awarded