



**GOVERNING BOARD AGENDA ITEM FORM  
AMPHITHEATER UNIFIED SCHOOL DISTRICT NO. 10**

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**DATE OF MEETING:** February 5, 2013

**TITLE:** Award of Contract for a Human Resources Benefits Consultant Based on Responses to Request for Proposal (RFP) 12-0032

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**BACKGROUND:**

The Amphitheater School District's Human Resources Department requires the services of an employee benefits consultant to advise the District on proposed and approved legislation which may impact the District's employee benefit program. The list of legislation includes: the Patient Protection and Affordable Care Act (PPACA), compliance with state & federal laws, consulting on national, regional & local health issues, issuing proposals for employee benefits, proposal analysis, rate analysis and contract signing. Additional services to include: an employee benefits hand book, wellness programs, claims advocacy and training Human Resources personnel.

Eight companies responded, The Mahoney Group, Holmes Murphy & Associates, Capital Financial, GBP Risk Solutions, Buck Consultants, CBIZ, The Bagnall Company and Segal Company. Elizabeth Virant, Director of Health Services, Joyce Martin, Benefits Manager and Todd Jaeger, Associate to the Superintendent evaluated each proposal. Please see the attached vendor evaluation sheet.

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**RECOMMENDATION:**

The Administration recommends that the Governing Board approve the Award of Contract for a Human Resources Benefits Consultant to The Bagnall Company based on their response to Request for Proposal (RFP) 12-0032.

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**INITIATED BY:**

*Scott Little*

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Scott Little, Chief Financial Officer

Date: January 28, 2013

*Patrick Nelson*

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Patrick Nelson, Superintendent

The eight vendors were ranked based on their response to Request for Proposal (RFP) 12-0032.

The Bagnall Company was the highest rated vendor followed by The Mahoney Group, CBIZ, Segal Company, GBP Risk Solutions, Buck Consultants, Capital Financial and Holmes Murphy & Associates.

Vendor Evaluation Criteria:

A. Qualifications & experience to provide the scope of work / services required

The Bagnall Company listed twenty current clients which included Arizona school districts, seven of which have been with Bagnall seventeen years or longer and seven clients five years or longer.

B. The organizational team assigned / individuals identified (with references / resumes) to support the District

The staff qualifications include: a Chartered Life Underwriter (CLU), a Registered Health Underwriter (RHU), a Registered Employee Benefits Consultant (REBC), a Group Benefits Associate (GBA), a Certified Senior Professional Human Resources (SPHR), and a Certified Wellness Coach (CWC). References were provided from Maricopa Unified School District, Catalina Foothills Unified School District, Florence Unified School District, Dysart Unified School District and Marana Unified School District.

C. Demonstrated success as consultant to public school benefits procurement & management

Client surveys, 93% rate The Bagnall Company as excellent regarding their overall technical and professional advice and 100% reporting always timely, always responsive.

D. Proposed fee schedule

The Bagnall Company provided the following fee schedule:

February 2013 -June 2013 \$22,650, July 1, 2013-June 2014, \$45,300, July 1, 2014-June 2015, \$47,000, July 2015-June 2016, \$47,000, July 1, 2016-June 30, 2017, \$49,000  
The above fee schedule is an inclusive not to exceed annual compensation for the services required as per Request for Proposal 12-0032. Additional consulting services outside the scope of work RFP 12-0032 to be billed at \$100 per hr.

The Evaluation Team was impressed with the detail and effort made by The Bagnall Company in their response to the RFP which differentiated their proposal from the remaining responding vendors. A complete vendor evaluation schedule is on file at the Amphitheater Purchasing Department.