

Request for Proposal (RFP)

Employee Benefits Brokerage & Consulting Services

Issued by: Jefferson Regional (Jefferson Hospital Association)

Location: Pine Bluff, Arkansas

RFP Purpose

Jefferson Regional is seeking proposals from qualified employee benefits brokerage and consulting firms to provide strategic guidance, market expertise, compliance support, and hands-on service for the design and management of employee benefit programs aligned with our organizational goals.

This RFP is not an offer or a binding agreement. Jefferson Regional assumes no obligation or liability as a result of issuing this RFP.

1. Introduction & Background

Jefferson Regional is a regional healthcare system serving Southeast Arkansas. Our workforce includes clinical, administrative, and support staff across multiple facilities. We aim to partner with a benefits broker who can deliver:

- Strategic benefits planning
- Cost management and forecasting
- Vendor and carrier oversight
- Employee communication and engagement
- Compliance and regulatory support
- Data-driven insights and reporting

Current Benefits Program

Jefferson Regional's benefits package includes:

- Medical (self-funded), dental, and vision plans
- Pharmacy benefits (self-funded)
- Life and AD&D insurance
- Short- and long-term disability
- FSAs and HSAs

- Retirement plans (401k/403b/457)
- Voluntary benefits

The selected partner will work closely with HR leadership to ensure competitive, cost-effective, employee-centered benefits.

2. Scope of Services

Respondents must address each section below in detail. For every subsection, include:

- **Description of capabilities**
 - **Specific services provided**
 - **Tools, technology, or methodologies used**
 - **Examples, case studies, or sample deliverables**
 - **Roles of team members involved**
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2.1 Strategic Benefits Consulting

Respondents should describe their approach to:

Required Response Elements

- Annual benefits strategy development
 - Describe your process, timeline, and deliverables.
 - Provide a sample strategic plan or outline.
 - Multi-year cost modeling and forecasting
 - Explain your forecasting tools and assumptions.
 - Provide sample models or dashboards.
 - Market trend analysis and benchmarking against healthcare industry peers
 - Identify data sources (e.g., national surveys, proprietary databases).
 - Provide sample benchmarking reports.
 - Plan design recommendations and alternative funding strategies
 - Describe your experience with self-funded, level-funded, and hybrid models.
 - Provide examples of cost savings or plan improvements achieved for similar clients.
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2.2 Brokerage & Market Negotiation

Required Response Elements

- Marketing and negotiation of medical, dental, vision, and ancillary lines
 - Describe your marketing process, timeline, and evaluation criteria.
 - Renewal analysis and negotiation
 - Provide a sample renewal analysis.
 - Carrier performance evaluation
 - Describe your evaluation framework and metrics.
 - PBM review and optimization
 - Explain your approach to contract review, rebate analysis, and formulary management.
 - Provide examples of savings achieved.
 - Vendor Management
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2.3 Compliance & Regulatory Support

Required Response Elements

- ACA compliance and reporting guidance
 - Describe your support model and tools used.
 - ERISA, HIPAA, COBRA, and DOL compliance
 - Provide examples of compliance audits or checklists.
 - Legislative updates and impact analysis
 - Explain how updates are monitored, interpreted, and communicated to clients.
 - Provide sample legislative alerts or client communications.
 - Plan document and SPD review
 - Describe your review process and frequency.
 - Support with required filings (e.g. Form 5500)
 - Assist with audits and reporting
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2.4 Employee Experience & Engagement

Required Response Elements

- Open enrollment planning and execution
 - Provide a sample OE project plan.
- Benefits education materials
 - Include samples of digital, print, and video materials.
- On-site or virtual employee meetings
 - Describe your approach, staffing, and scheduling.
- Year-round communication strategy

- Provide examples of ongoing communication campaigns.
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2.5 Data Analytics & Reporting

Required Response Elements

- Claims analysis, utilization reporting and cost driver identification
 - Provide sample reports or dashboards.
 - Predictive analytics and trend identification
 - Describe tools, data sources, and methodologies.
 - Performance metrics and dashboards
 - Monthly/quarterly reporting
 - Provide sample reporting packages.
 - Stop-loss evaluation
 - Describe your evaluation criteria and negotiation approach.
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2.6 Vendor & Plan Administration Support

Required Response Elements

- Issue resolution and escalation
 - Describe your escalation process and service standards.
 - Coordination with carriers, TPAs, and PBMs
 - Provide examples of vendor management success.
 - Support for wellness initiatives
 - Describe your experience with wellness program design and vendor selection.
 - HRIS/benefits administration platform support
 - Describe your experience with ADP and other systems.
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2.7 Account Management

Required Response Elements

- Dedicated account team structure
 - Provide an org chart for the proposed team.
- Service standards and response times
 - Provide SLAs or internal service metrics.
- Availability for on-site meetings

- Describe expected frequency and staffing.
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3. Proposal Requirements

Respondents must organize their proposal using the structure below.

3.1 Company Overview

Required Response Elements

- Firm history, ownership, and organizational structure
 - Office locations and geographic service footprint
 - Total number of employees and functional roles
 - Experience with healthcare organizations and hospitals
 - Number of employer groups served, including:
 - Groups with 1,000+ employees
 - Healthcare systems
 - Self-funded employers
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3.2 Team Qualifications

Required Response Elements

- Bios for each proposed team member
 - Include education, certifications, and relevant experience.
 - Roles and responsibilities
 - Identify primary and secondary contacts.
 - Certifications (CEBS, GBA, PHR/SPHR, SHRM-CP/SCP, etc.)
 - Firm's approach to account management
 - Describe communication cadence, meeting schedules, and escalation paths.
 - Client response time standards
 - Experience with healthcare or similar size organizations
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3.3 Approach & Methodology

Required Response Elements

- Benefits strategy development process
 - Renewal and marketing methodology
 - Communication philosophy and client engagement model
 - Compliance support model (including HIPAA safeguards)
 - Data analytics tools and capabilities
 - Use of market trends, research, and innovation
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3.4 Technology Capabilities

Required Response Elements

- HRIS/benefits administration support
 - Employee self-service tools
 - Reporting dashboards (include screenshots or samples)
 - Integration capabilities with ADP and other payroll/HR systems
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3.5 Fees & Compensation

Required Response Elements

- Proposed detailed compensation structure
 - Fee-based, commission-based, hybrid
 - Detailed fee proposal for the engagement
 - Annual fees
 - Optional services
 - Implementation fees (if applicable)
 - Disclosure of all revenue sources
 - Overrides
 - Bonuses
 - Contingencies
 - Carrier-paid compensation
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3.6 References

Required Response Elements

Provide at least **three healthcare or hospital clients**, including:

- Organization name
 - Contact name and title
 - Phone number
 - Email address
 - Length of relationship
 - Scope of services provided
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4. Evaluation Criteria

Jefferson Regional will evaluate proposals based on the following weighted criteria:

Evaluation Area	Weight
Experience with healthcare organizations	High
Strategic consulting capabilities	High
Cost transparency and fee structure	High
Technology and analytics tools	Medium
Employee communication capabilities	Medium
Account team expertise	Medium
Cultural fit and service model	Medium
References and past performance	Medium
Compliance knowledge and Support Capabilities	Medium

5. RFP Timeline

- RFP Issued: April 10
 - Deadline for Questions: April 17
 - Responses to Questions Provided: April 24
 - Proposal Submission Deadline: May 8
 - Finalist Presentations: June 2026
 - Selection Completed: July 2026
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6. Submission Instructions

Submit one consolidated PDF electronically to:

Wendy Talbot
Vice President & Chief People Officer
Jefferson Regional
talbotw@jrnc.org
870-541-7661

Proposals must be received by **Friday, May 8 at 5:00 p.m.**

7. Terms & Conditions

- Jefferson Regional reserves the right to accept or reject any proposal.
 - All proposal materials become the property of Jefferson Regional.
 - Respondents are responsible for all costs associated with proposal preparation.
 - The selected broker must agree to confidentiality and HIPAA compliance requirements.
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