

**REQUEST FOR APPLICATIONS
EMPLOYEE BENEFIT INSURANCE AGENT OF RECORD**

Linn County invites applications from licensed insurance agents or brokers to act as an insurance agent of record for the purpose of providing services to evaluate and secure employee benefit insurance contracts. Applications will be received by Linn County, through its duly elected Board of Commissioners, not later than, **5:00 p.m. on Wednesday, December 22, 2021**. Applications should be directed to Darrin Lane, Administrative Officer, and be marked "Application for Employee Benefit Insurance Agent of Record". The application should be mailed to PO Box 100, Albany, Oregon 97321, or be delivered to Room 201, Linn County Courthouse, 300 Fourth Avenue SW, Albany, Oregon. Questions may also be directed to Darrin Lane at (541) 967-3825 or via email at dlane@co.linn.or.us.

The agent of record "Application Instructions" is provided on the following pages. Applicants must submit the information and responses required by the Application Instructions. The County reserves the right to reject any and all applications submitted if it is in the public interest to do so.

APPLICATION INSTRUCTIONS

Linn County Employee Benefit Insurance Agent of Record

APPLICATION DEADLINE: 5:00PM PST on December 22, 2021

Linn County is inviting applications from licensed insurance agents or brokers to act as the County's Agent of Record for the purpose of providing services in connection with evaluating and securing employee benefit insurance contracts. The County's benefit insurance plans, primarily health insurance (currently with Moda Health, Willamette Dental and Kaiser Permanente), provide coverage for approximately 715 FTE employees of Linn County. The appointment, which in accordance with Linn County Code shall not exceed three (3) years, will be made using the following criteria to evaluate the applications:

1. A demonstrated understanding of employee benefit insurance and programs.
2. The experience and qualifications of key personnel.
3. A demonstrated ability to handle Linn County's employee benefit insurance needs in a timely and cost-effective manner.

The applicant must submit an application in which the applicant addresses each of the "Requests for Information" listed below. The applicant may also submit prepared company brochures as part of the application; however, the specific information submitted in the application which address the "Requests for Information" shall be considered the primary application response and **will be the basis for evaluating the application and selecting agents to interview.** The applicant shall address each Request for Information in the following manner: the number in front of the requested information shall be first written, followed by the response. Unsigned applications will not be considered.

REQUESTS FOR INFORMATION

1. Firm or agent name, mail and email addresses, telephone and FAX numbers, name of person preparing the application with date, title and signature by an individual authorized to bind the firm or agent of record.
2. Number of years the firm or agent has been in business.
3. Firm's or agent of record's approximate annual employee benefit insurance premium volume.
4. Does the firm or agent have access to all available health/employee benefit insurance companies and programs in the state? Specifically list the health insurance companies that the firm or agent is using.
5. Name the person or persons who will be directly responsible for the County's account. What are their number of years of insurance experience in servicing public entities? How often in a year would they call on the County for insurance program reviews and updating?

6. Describe the employee benefit and claims handling assistance the firm or agent would provide the County and its employees.
7. Describe the wellness services available from or through the firm or agent.
8. Describe the assistance the firm or agent would provide the County in developing detailed and summary claims data. Enclose examples.
9. Describe what services the firm or agent would provide to assist the County in evaluating and managing the employee benefit insurance plans to maximize benefits and minimize costs.
 - a. Describe the method the firm or agent will use to assist the County's Insurance Committee in establishing future insurance premium costs.
 - b. Describe the assistance the firm or agent of record can provide in improving employee benefit programs.
10. Does the firm or agent carry professional liability? If so, please indicate Company and amount.
11. List four (if possible) public entities currently being served as benefit Agent of Record (preferably counties or cities close to Linn County in size) and provide the name and telephone number of a person to contact for a reference.
12. What specific contract payment amount (to be paid directly by the County) would be proposed for each of the three (3) years to provide agent of record services? (The firm or agent compensation is established by a contract with the County, not by commissions from the insurance companies.)
13. Describe the method the firm or agent will use to secure competitive premium quotes for the County's employee benefit insurance coverage.
14. Provide any other information relative to the firm or agent of record that might be pertinent to selection as Linn County's Agent of Record.