



THE BRIËN CENTER
Your courage, our care.

Request for Proposal

EMPLOYEE BENEFITS BROKER/CONSULTING SERVICES

Proposal Due Date: Thursday, March 7, 2024

Senior Vice President of Finance & Administration

Richard.Wilson@briencenter.org

and

Vice President of Human Resources

Amy.Thomson@briencenter.org

Sealed proposals for Employee Benefits Broker/Consulting Services solutions are requested by the Benefits Selection Committee of The Brien Center for Mental Health and Substance Abuse Services, Inc. ("The Brien Center"). All proposals should be submitted to Richard Wilson, Senior Vice President of Finance & Administration and Amy Thomson, Vice President of Human Resources on or before 4:00 p.m. on Thursday, February 29, 2024.

The information contained in this RFP is provided in the following sections:

1. The Brien Center History
2. The Brien Center Staff Organization and Responsibilities
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1. The Brien Center History

The Brien Center, <https://www.briencenter.org/>, is a well-known and distinguished organization dedicated to providing mental health and substance use services in Berkshire County, Massachusetts. Here is a brief history of The Brien Center:

Founding and Early Years

- The Brien Center had been in business for over a century, having been founded in 1920.
- Dr. Austen Riggs, founder of the Austen Riggs Center in Stockbridge, opened the first psychiatric clinic at the former House of Mercy Hospital in Pittsfield.
- The organization started with a modest staff and limited resources but quickly gained recognition for its commitment to improving the mental health of the community.
- In 1959 it became known as the Berkshire Mental Health Center; it began as a small community organization with the mission to provide mental health services to individuals in need.
- The organization's name evolved over the years and was established as The Brien Center in 2003.
- Its long history reflects its enduring commitment to the well-being of the community and the individuals it serves.

Growth and Expansion

- The two-room Riggs Clinic has grown to a county-wide system of care with 26 locations and more than 450 employees scattered throughout the Berkshires with multiple service locations across Berkshire County, including Pittsfield, Great Barrington, and North Adams.
- The organization's growth has allowed it to serve a larger and more diverse population in Western Massachusetts.

Business Philosophy

- The Brien Center has maintained a client-centered and community-focused philosophy throughout its history.
- It is dedicated to providing accessible, compassionate, and high-quality mental health and substance use services to individuals of all ages.
- The organization places a strong emphasis on tailoring its services to meet the unique needs of each individual and family.
- The Brien Center values creating a positive environment for its staff by fostering a supportive and inclusive workplace culture. This includes initiatives aimed at professional development, mental health and well-being support, and recognition of staff contributions. By prioritizing a positive work environment, the organization aims to ensure that employees feel valued, supported, and motivated to provide high-quality care and services.
- Collaboration with community partners, stakeholders, and local authorities is a cornerstone of The Brien Center's approach.

Size and Volume of Business

- The Brien Center had grown to become the largest provider of behavioral health services in Berkshire County.
- The organization serves close to 10,000 individuals annually and offers a wide range of services, including outpatient counseling, crisis intervention, residential treatment, and support for substance use disorders.
- The size and volume of business has increased significantly over the years to meet the growing demand for mental health and substance use services in the region.

2. The Brien Center Staff Organization and Responsibilities

The Brien Center Benefits Selection and Administration organizational members team.

- 1 – SVP of Finance and Administration
- 1 – VP of HR
- 1 – Human Resources Specialist
- 1 – Payroll Supervisor

3. Purpose of Employee Benefits Broker/Consulting Services

The Brien Center is seeking to contract with an Employee Benefits Broker/Consultant. The purpose of this Request for Proposal (RFP) is to identify a business partner who can offer competitive and comprehensive benefits packages, provide opportunities for employee satisfaction, assist in the recruitment and retention of employees, identify cost savings, and align with the needs of our staff and comparable to other peer institutions in the Massachusetts Behavioral Healthcare sector.

4. RFP Timeline

Thursday, February 8, 2024	RFP available online at https://www.briencenter.org/ Located under News - RFP
Monday, February 22, 2024	Questions due via email by 4:00 PM <u>EST</u> to: Richard.Wilson@briencenter.org and Amy.Thomson@briencenter.org Subject – RFP Benefits Broker
Wednesday, February 28, 2024	Responses to Question via e-mail by 4:00 PM EST
Thursday, March 7, 2024	Proposal due via email on or before 4:00 PM EST: Subject – RFP Benefits Broker Richard.Wilson@briencenter.org and Amy.Thomson@briencenter.org
Thursday, March 14, 2024	Invitation to Selected Brokers
Friday, March 22, 2024	Notification of Decision: Following Presentations

5. Description of The Brien Center

The Brien Center is Berkshire County’s largest provider of behavioral health services. We employ dedicated, compassionate people who work at 26 locations county-wide. Our impact is experienced and appreciated by individuals – whose lives are saved, whose illnesses are successfully treated, and who continue as successful members of our community.

We are proud of our comprehensive programs and services for highly complex problems, and continue to hear from clients, years later, that their lives and families remain intact because of our care.

Mission

Our mission is to provide high quality, comprehensive behavioral health services to Berkshire residents through community-based services that promote the highest possible degree of recovery, independence, and quality of life of those served. We will provide access and support to meet the behavioral health needs of individuals of all ages, race, and cultures, and culturally

competent care to promote recovery. We will accomplish this by working in partnership with state agencies, individuals, families, and other providers.

Vision

The Brien Center will distinguish itself as a leader in Community Behavioral Health and will be recognized for the passion of its people and partners in providing a continuum of dynamic and innovative recovery services.

Access and Affordability

Our professional staff work tirelessly to ensure all Berkshire County residents have access to the high-quality, affordable behavioral health services they need—when they need them, where they need them — right here in our community. We provide care without regard to age, race, culture, intellect, socioeconomic status, or insurance status in a manner that supports every person’s ability to live, work and participate in community life.

Commitment to Staff

Recognizing the importance of our dedicated staff, The Brien Center is committed to supporting their well-being and professional development. We understand that the quality of our services is directly linked to the health and satisfaction of our employees. Therefore, providing a comprehensive benefits package is essential to attract and retain top talent and ensure they are equipped to offer the best care to our clients.

Clinical Excellence

Our comprehensive, integrated treatment methods are based on a sound clinical foundation of advanced, evidence-based practices that incorporate the whole person—including their voice, their preferences, and their personal support network—throughout the process.

Philosophy

Our treatment philosophy is based on a comprehensive care model that incorporates recovery, resiliency, and rehabilitation principles; promotes individual and family choice; is evidence-based; and utilizes family, team, and natural supports that promote stabilization, recovery and wellness within the person’s community setting whenever possible. Our utmost priority is keeping people safe and supporting their choices and their voices throughout their treatment and recovery.

Organization

The Brien Center is led by a Board of Directors representing the populations and communities of Berkshire County. Officers are elected each year from among the members of the Board and by the Board at the Annual Meeting of the Board of Directors held in September. The Board meets six times per year. For more information on the Board of Directors, board meetings, or other board-related matters, please call our Administrative Offices at 413-499-0412.

Organizational Culture

The Brien Center employees serve Berkshire County residents with quality mental health and addiction services. Our agency’s culture thrives on trust, respect, and cooperation. Our employees are hard-working, dedicated individuals who strive to bring hope and recovery to those living with mental health and substance use disorders.

Quick Stats

- 450-500 Employees (71% are Union Employees, Service Employees International Union, Local 509)
- Close to 10,000 Clients Served
- 26 Locations, including Pittsfield, North Adams, and Great Barrington
- Fiscal year ends June 30
- Total revenue for FY 2023 is \$30,231,901

6. Current Benefits

The Brien Center currently has a July 1, 2024, plan renewal date. There are approximately 333 benefit eligible employees.

- Medical Carrier – Health New England (High Deductible, 2 HMO, 1 PPO)
- Dental Carrier – BCBS
- Vision – EyeMed Vision
- HRA, HSA and FSA Carrier – BRI
- Whole Life – MassMutual Whole Life
- Voluntary Life and AD&D – The Hartford
- Voluntary Short and Long-Term Disability – The Hartford
- Voluntary Accident – The Hartford
- Voluntary Critical Illness – The Hartford
- Voluntary Hospital Indemnity – The Hartford
- Voluntary Identity Protection – Allstate Identity Pro Plus

The Brien Center 's current employee benefits broker is Marsh McLellan Agency (MMA). The Brien Center has been with this broker for seven years. The Brien Center has extended benefits for the period January 1, 2024, through June 30, 2024, with MMA as part of a transition to have benefits coincide with the fiscal year which runs from July 1, 2024, through June 30, 2025. We are soliciting bids as part of our due diligence process.

7. Scope of Work

Broker Services Required

The selected broker/consultant will be expected to provide a high level of service, a comprehensive range of services to ensure the effective administration and management of the benefits plans, as well as well as a commitment to meeting the needs of The Brien Center and its employees. These services include:

Employee Support: Providing white-glove access to educational resources and real-time, one-on-one support to employees regarding their benefits. Conducting in-person and online

informational sessions, preparing communication materials, and offering individual support as needed. As well as improving outcomes, lowering costs, and passing through savings.

Financial and Data Analytics: Determining and recommending the most economical and efficient funding arrangements for benefit programs. Evaluating current cost of benefits vs. effectiveness of plan design. Performing carrier-specific trend analysis from available diagnostic & normative data. Providing benchmarking with data and making recommendations in support of strategy and objectives.

Strategy Development: Developing long-range employee benefit goals and strategies. Providing an annual review and summary of employee benefits including analysis of the quality of benefit, cost-effectiveness, competitiveness, and recommendations. Providing recommendations for establishing and prioritizing objectives aligned to organizational goals. Coordinating appropriately with internal resources to support projects identified in strategic plan.

Plan Selection, Renewal, and Management: Assisting in selecting the most suitable benefit plans. Ongoing management and optimization of these plans based on the evolving needs of The Brien Center and its employees. Conducting a pre-renewal strategy meeting to determine specific goals, budget and needs to be achieved from renewal negotiations. Reviewing renewal methodology, experience data, and assumptions against trend analysis for accuracy and logic. Negotiating renewals with existing incumbent carriers. Evaluating carrier capabilities, client support services and financial strength ratings. Scheduling and facilitating selected finalist interviews and site visits, as appropriate. Providing recommendations on vendors best suited to meet plan goals and objectives. Establishing carrier/vendor performance guarantees with monetary penalties, as appropriate.

Account Management: Providing ongoing service and responding to inquiries from Finance, Human Resources, and the Benefits administration team, with regards to day-to-day administration of benefit program matters, consultation on policy coverages, etc. Facilitating processes related to changes in coverage, including notifying insureds of changes in coverage, obtaining approvals, confirming acceptance of client, etc. Acting as an employee/employer advocate in the resolution of escalated service and/or claims issues. Keeping the organization informed of trends, regulations and other issues that may impact their benefit programs. Organizing and facilitating meetings, including carrier reviews, financial reporting, and vendor meetings.

Implementation and Enrollment: Implementing/Reviewing current electronic data transfer processes with vendors, as appropriate. Finalizing benefit program design and rates, including COBRA and fees. Providing contribution modeling (employee/employer) based on enrollment and financial targets. Assisting in planning employee open enrollment meetings, including carrier participation. Facilitating local enrollment meetings or webcast enrollment meetings.

Legal and Compliance: Expert advice from ERISA & Benefit Attorneys on any issues relating to Health & Welfare, compensation, State issues, and HIPAA. Providing monthly legal publications outlining key legal topics (or providing more frequently when needed). Completing a Benefits booklet review including ERISA compliant SPD/Plan Documentation. Creating a Summary Wrap Document with all employer legal disclosures. Providing 5500 Reporting - collecting all

Schedule A's and preparing full report. Creating annual compliance notices. Providing benefits training to Human Resource staff (including HIPAA, Leave of Absence, Health Care Reform, etc.).

Education, and Communications: Evaluate current communication strategy and develop an appropriate action plan in accordance with business needs and budgetary requirements. Leading a tailored communication option for open enrollment using best practice messaging and design to meet employer's needs, such as guide, flipbook, videos, poster, postcard, table tent, mobile wallet, etc. Creating and analyzing employee surveys. Sharing monthly webcasts and local seminars.

Health Management and Well-Being Services: Experienced wellbeing consultant assisting with strategic planning, vendor selection, and general wellbeing guidance. Providing a comprehensive approach to understanding how organization environment contributes to health and wellbeing of employees. Reviewing utilization data to determine appropriate wellbeing program design. Assisting with business plan creation, selection of goals & objectives, creating a budget. Introducing turnkey wellbeing programs. Delivering market assistance with wellbeing vendor selection. Managing ongoing relationships with wellbeing vendors at regional and national level.

Regulatory Compliance and Reporting: Ensuring that all offered plans comply with relevant federal and state laws and regulations. The broker should also assist in providing metrics and any reporting requirements related to the benefits.

Claims Assistance and Dispute Resolution: Offering personalized support in the event of claims, disputes, or issues with benefit providers.

8. Minimum Qualifications

To be eligible for consideration, brokers must meet the following criteria:

Licensing: Properly licensed to provide brokerage services in the state where The Brien Center operates.

Experience: Demonstrated experience in providing brokerage services for similar-sized organizations, preferably within the Massachusetts behavioral healthcare sector.

Reputation: A track record of reliability, ethical practices, and customer satisfaction.

9. Proposal Requirements

Comprehensive Benefits Plans Required

The Brien Center invites proposals for comprehensive benefits plans that will cater to the diverse needs of our staff. The selected broker should be able to provide a range of plans that are competitive and aligned with industry standards in Massachusetts Behavioral Healthcare.

Medical Insurance: Proposals should include options for medical insurance that offer extensive coverage, including preventive care, emergency services, hospitalization, mental health

services, and prescription drugs. The plans should cater to a variety of needs and preferences, including PPO, HMO, and high-deductible health plans.

Dental Insurance: Dental insurance options should cover preventive, basic, and major dental care. Proposals should detail the levels of coverage, including orthodontics, if available.

Vision Insurance: Vision insurance should cover routine eye exams, glasses, and contact lenses. The proposal should outline the extent of coverage and any available discounts on vision-related products or services.

Other Benefits: We also seek proposals for life insurance, short-term and long-term disability insurance, and any additional wellness or health-related benefits that can contribute to the well-being of our employees.

Comparative Analysis: Brokers are requested to provide a comparative analysis of their proposed plans against similar institutions in the behavioral healthcare sector. This analysis should highlight the competitiveness and comprehensiveness of the proposed plans.

10. Submission of Proposal Instructions

Proposals should be presented in a clear and organized manner, following the structure outlined in this RFP. The following questions must be answered and customized to The Brien Center in your proposal.

Firm Foundation: Briefly describe the broker/consultant's history, number of employees, location, and years in existence. Describe your market leverage in Massachusetts, the Northeast and nationally in the marketplace. Describe the financial status of your firm. Describe your experience in providing consulting/brokerage services to companies of comparable size and complexity in the Massachusetts behavioral health care services arena like The Brien Center. Please provide proof of licensing and relevant certifications.

Account Team: How are your account teams structured? Please include a brief resumé of the service team members who would service The Brien Center, including qualifications, expertise, time in industry, office where they are located, and size and number of accounts served per team member. Who will be the day-to-day servicing contacts for the account?

Account Service: What is your company service philosophy? How can your firm support organizations the size of the Brien Center? Describe your firm's approach for managing the annual renewal and negotiation process, including strategy & cost control, pre-renewal planning, marketing strategies, renewal negotiations, and the final negotiation and selection of new vendors. How has your brokerage firm successfully advocated for clients during negotiations with carriers to achieve lower costs and improved plan designs? Could you provide examples from other companies or describe your methodology? Describe your firm's capabilities with respect to employee communications. What services will you provide to assist our organization during the open enrollment process and throughout the year? How can your

firm assist with employee questions and issues? Does your firm offer concierge services? What wellness resources does your firm offer? What services are included and what are the costs associated with those services? Can your firm implement wellness initiatives?

Legislative Compliance: Describe your resources for remaining current on legislative and regulatory developments and how you communicate the information to clients. Do you have in-house legal advisors who provide counsel to your clients? Please describe their qualifications. Describe specific resources you have in place to assist clients with the compliance of health care reform. Do you assist clients in filing their Form 5500s?

Data Analysis: What resources do you use to analyze medical and pharmacy claims? Do clients have access to the data for ad hoc claims queries? If so, please describe. What is the typical turn-around time for data requests? Will your organization complete a provider analysis of physicians, clinics, and hospitals that treat our plan participants? Will your organization provide a wellness and preventive health analysis of our employees and claims experience? For any of the above questions that you answered yes, please provide The Brien Center with a sample report that you have prepared for another client.

Additional Services: What resources do you use for benchmarking? Do you maintain a national database of clients across all major sectors and employee populations? How does your firm address the needs of a diverse workforce? What is your approach to meeting the needs of all employees? Does your firm have the resources to meet the needs of a multi-location workforce? Describe your firm's data analytics capabilities. Describe the methods you employ to disseminate information about current trends, innovation, and emerging hot topics. What type of HR consulting services does your firm offer outside of benefits? Please describe your benefit communication capabilities and what resources would be available to a client of our size. Please describe how your firm would help with administrative/technical issues with vendors.

Transition of Services: If your firm is selected, how would you assist us with the transition of services, including communications, strategy development, implementation, and measurements/trends? Please provide details.

Diversity, Equity, and Inclusion: Our organization is committed to its core values in support of creating business relationships with local vendors from systemic and historically marginalized backgrounds:

- BIPOC owned
- LGBTQIA+ owned
- Veteran owned
- Women owned
- Indigenous People owned
- People with disabilities owned

We want to ensure that maximum opportunities exist for such business associates and vendors who also support these values by:

- Developing partnerships between diverse and marginalized vendors that result in lasting business relationships.
- Maintaining a high standard of quality in all products and services provided.
- Promote diversification of contractor vendors through working with organizations that value increased opportunities to work with local and diverse vendors.

Could you please elaborate how your company participates in these important topics and issues within your operations and services? How do these initiatives contribute to fostering an inclusive environment, and could you share any outcomes or impacts these efforts have had?

Compensation: Describe how you would prefer to be compensated (i.e. fee for service, monthly retainer, commissions, etc.). What is your proposed annual fee? How will this fee change in subsequent years? Please provide a detailed scope of services list indicating the services included in your proposed annual fee. Provide any applicable performance guarantees you can provide if you are selected as our broker/consultant.

References: Provide at least three references of current clients who are similar to The Brien Center with respect to size and complexity including company name, address, contact name/title, contact telephone number, number of years with firm, number of years with main service lead.

11. Selection Process

Proposals will be evaluated based on:

Comprehensiveness of Plans: The range and depth of coverage offered in the plans.

Cost Competitiveness: Competitive pricing and value for money.

Service Quality: Quality of support and services proposed.

Experience in Behavioral Healthcare Sector: Specific experience and understanding of the healthcare sector, especially Massachusetts Behavioral Healthcare.

Following a review and evaluation of the submitted proposals, The Brien Center anticipates inviting finalists to meet with select members of the Benefits Broker/Consultant Selection Team. The Team will select one of the vendors and make a recommendation to the Chief Executive Officer. The agreement with the selected vendor will be signed by the Senior Vice President for Finance and Administration.

12. Terms and Conditions

General Terms

Confidentiality: All proposals and communications will be treated as confidential.

Compliance: The selected broker must comply with all applicable laws and regulations.

Contractual Agreement: A contractual agreement will be established with the selected broker, outlining the terms of service, payment, and other conditions.

Disclaimer

All proposals and related materials become the property of The Brien Center and may be returned only at its option.

The Brien Center is not obligated to accept any proposal or to negotiate with any proposal, and to cancel or modify the RFP process at any time. All transactions are subject to the final approval of The Brien Center who reserves the right to reject any or all proposals without cause for liability.

All costs directly or indirectly related to responding to this RFP (including all costs incurred in supplementary documentation, information, or presentation) will be borne by the proposer.