

City of Douglas

Gallagher Response to Request for Proposal # 2024-HR-001

November 05, 2024

Patrick Dittman
Area Vice President

Gallagher Benefit Services, Inc.
333 East Osborn Road, Ste 270
Phoenix AZ 85012



Insurance | Risk Management | Consulting

PRICE PAGE

Offeror shall provide a charge or fee for provision of all services described herein and in accordance with the following fee schedule.

1. This fee proposal shall include all work necessary to effectively conduct and complete the Scope of Services. The fees stated below must include all necessary costs including, but not limited to, labor, materials, overhead, administrative charges, profit and insurance.

\$ Forty-eight Thousand Nine Hundred Sixty
(Words)

(\$ 48,960.00)
(Figures)

2. Consultant shall provide proposed hourly rates for any additional services not listed under the Scope of Services.

\$250 - \$400 per hour based on Scope of Services

D. PRICE PROPOSAL

Propose firm, fixed fee for the provision of services described in this RFP. In addition, provide fully loaded rates including direct and indirect costs and overhead and profit margin for additional services that may be required. The fees proposed shall be based on obtaining the types and amounts of coverage and those services consistent with a full-service brokerage house for specified lines of employee benefits. Any other sources of income, revenue, consideration or compensation, including but not limited to commissions and overrides received by the Consultant/Broker in connection with the City's account must be disclosed and either remitted to the City, or subtracted from the fee received from the City of Douglas.

We are open to your preferred method of compensation. The standard options include fees, commissions, or a combination of both.

Gallagher's operating standard policy mandates timely disclosure of all revenue related to services or products provided to or placed on behalf of the client. the City can expect to receive a compensation disclosure at least once a year. Transparency is a fundamental principle of the Gallagher Way.

Our Proposed Compensation

For the medical plan, we propose a per month fee of \$4,080.00 which can be billed via your insurance carrier or directly; based on your preference. Compensation for non-medical insurance / ancillary lines of coverage (life, disability, vision, etc.) will be based on the carrier's standard schedules.



NOVEMBER 2024

RFP for Benefits Consultant/Broker

City of Douglas #2024-HR-001



Tina Jensen, Sr. Vice President
tjensen@moreton.com

Josh Andrew, Advisor
jandrew@moreton.com



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1. This fee proposal shall include all work necessary to effectively conduct and complete the Scope of Services. The fees stated below must include all necessary costs including, but not limited to, labor, materials, overhead, administrative charges, profit and insurance.

\$ Seven thousand dollars per month

(Words)

(\$ \$7,000 Per Month)

(Figures)

2. Consultant shall provide proposed hourly rates for any additional services not listed under the Scope of Services.

Moreton & Company does not charge by the hour; our cost proposal is all inclusive.



Response to Request for Proposal for
Employee Benefits Brokerage/Consulting Services
City of Douglas

November 5th, 2024
4:00 PM

Submitted by:

Joy Giblin, GBDS

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www.usi.com

THE USI  ONE ADVANTAGE[®]

PRICE PAGE

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1. This fee proposal shall include all work necessary to effectively conduct and complete the Scope of Services. The fees stated below must include all necessary costs including, but not limited to, labor, materials, overhead, administrative charges, profit and insurance.

\$ Sixty Thousand Dollars

(Words)

(\$ 60,000)

(Figures)

2. Consultant shall provide proposed hourly rates for any additional services not listed under the Scope of Services.

Retirement Services is for an additional fee.



A Leavitt Group Company

What Our Team Can Do for The City of Douglas

PROPOSAL FOR

**Employee Benefits Brokerage
& Consulting Services**

PREPARED FOR

The City of Douglas

425 East 10th Street, Douglas,
Arizona, 85607

PRICE PAGE

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1. This fee proposal shall include all work necessary to effectively conduct and complete the Scope of Services. The fees stated below must include all necessary costs including, but not limited to, labor, materials, overhead, administrative charges, profit and insurance.

\$ Twelve Dollars Per Employee Per Month

(Words)

(\$ 12 PEPM)

(Figures)

GBS proposes \$12 PEPM on medical and dental benefits. In addition, GBS would be eligible for standard commissions on ancillary lines of coverage.

All compensation received on the City's lines of coverage will be fully disclosed and completely transparent. Our firm discloses annually, and/or upon request, compensation we will be eligible to receive from benefit carriers and other applicable sources, including commissions and contingent compensation. This information not only helps your team better understand the services we provide and how we are paid, but it also fulfills your fiduciary obligations under ERISA 408(B)2.

GBS believes in compensation flexibility. Our team is happy to discuss alternative compensation arrangements with the City.

2. Consultant shall provide proposed hourly rates for any additional services not listed under the Scope of Services.

In addition to our Included Services, GBS provides the following optional services at an additional cost (variable fees based on service).

- GBS Rx Advantage | Specialty Pharmacy Program
- GBS Retire | 401(k) / Retirement Plan Consulting
- Boost HR & Recruiting | HR Consulting & Recruiting Services

Please Note:

Innovative partners and vendors listed in this proposal are third-party. As such, their services are not included in GBS compensation; however, some of our exclusive partnerships allow GBS to provide our clients with preferred pricing.