



Question & Answers from PEO RFP Process
Questions due Friday, November 16, 2018 by 3pm
Final version posted on November 20, 2018

Question #1. I see that it stated you will provide a census, however for us to be able to underwrite and fully guarantee rates we will need quite a bit more info. Will this be provided after the meeting as well?
Answer: We are sharing a set of documents referenced in the Mandatory Pre-Bid Meeting presentation to all attendees of the meeting, as well as some additional documents, due to the submitted questions. The documents include: 2018-2019 Benefits Guide, Rate Sheet, Medical Summary Plan Description, 2016-17 and 2017-18 BCBS Loss Runs, Benefits Utilization Report as of March 2018 (past plan year) and November 2018 (current plan year), Current Census Data (in both pdf and excel), Sept 2018 BCBS bill, Recent medical and ancillary benefits bills, one each medical and ancillary benefits bills from FY18, Worker's Comp Declaration pages, FY18 Worker's Comp loss run, and FY15-YTD FY19 Worker's Comp loss run.

Please Note: the two "LOOP" employees that are noted on our benefits will remain so. This is an organization that we support and are their fiscal agent.

Question #2. Are proposers required to integrate with your existing systems (Paychex, Taleo, Liazon etc.) or are the schools willing to consider other options?

Answer: Our intent is to consider a full suite of options available via the PEO's own internal HRIS. We would prefer one suite of software to provide these functions. The functionality provided by Liazon and Paychex, in particular, we assume would be conducted via the PEO's HRIS.

Question #3. What data do you want to feed over to Blackbaud? Demographic info? General ledger info? Payroll data?

Answer: Payroll and general ledger data.

Question #4. Is a proposer required to currently have an integration with Blackbaud or can they be willing to build a connection?

Answer: Evidence that a connection is possible in the implementation timeframe is required.

Question #5. What type of specific reporting needs does FirstLine have?

Answer: The current proposal outlines our data needs. As noted in the proposal, we are required to complete the PEP report (Profile of Educational Personnel). Additional information regarding the report can be found here:

[https://leads13.doe.louisiana.gov/lug/PEP/2018-19%20PEP%20User%20Guide%20Version%201.0%20\(Official\).pdf](https://leads13.doe.louisiana.gov/lug/PEP/2018-19%20PEP%20User%20Guide%20Version%201.0%20(Official).pdf).

This report requires data related to teacher demographics and certification information. In addition, we are regularly required to access and report on financial information. This requires tracking of object function codes for all staff assignments. We also complete reporting for the Compass report, which requires data related to teacher certification and performance in the classroom. Tracking of certification data is critical to FirstLine Schools.

Question #6. In terms of current structure, what is the employer/employee relationship between the schools and the charter school management organization?

Answer: Each individual school within our network is a LEA (Local Education Agency). All employees across all site locations are employed by FirstLine Schools. All employees across all site locations are on one group plan for health benefits.

Question #7. In recognizing that FirstLine Schools currently has two open RFPs - one for PEO and one for HRMS/HRIS - ultimately what is FirstLine looking to achieve?

Answer: We are currently exploring all options. If we decide PEO services are the way to go to support our needs, a HRMS/HRIS would not be considered.

Question #8. Would you be open to keeping existing tools/systems? Specifically, if we could connect into your current payroll system, would that be a preference for you?

Answer: Not particularly. It is our preference to have one suite of systems.

Question #9. Would the software (Blackbaud) need to be integrated by July 1 or prior?

Answer: Ideally prior to July 1. As long as the Proposer has familiarity working with an API. We may also be able to have a regular manual update scheduled. These details will be confirmed during the implementation phase.

Question #10. Do you have any API documentation so we can be more detailed in how we respond to the RFP?

Answer: [Blackbaud API Documentation \(https://developer.blackbaud.com/skyapi/\)](https://developer.blackbaud.com/skyapi/)

Question #11. What do you see now as biggest challenges looking to solve in terms of landscape that you are operating in?

Answer: The two main challenges include our system integration needs and the cost of benefits. These are the two main reasons we are considering a PEO. Additionally, we are working to find the best way to support the HR and Talent needs of our organization. Additional context: We are experiencing a teacher shortage across the country. Our benefits renewal rates have gone up over the last few years. We want to ensure we are providing benefits that teachers and staff deserve at a cost that works as the employer. On average, we received recent benefits increases of 18%.

Question #12. Benefits question: Are you fully insured? Has there been any consideration of self insurance?

Answer: Yes and yes. We are considering all options now - including self-insurance.

Question #13. Is there a union presence or threat?

Answer: We do not, at this time, work with a union.

Question #14. May we please get census in excel, including current benefit elections for each person?

Answer: Yes. The folder with these documents will be re-shared when this has been uploaded.

Question #15. May we please get actual premium rates for all benefit plans?

Answer: These are included on the “BCBS Medical plans” that were shared in the folder.

Question #16. Plans shown in the benefits guide and the plan summary seem inconsistent with the plan names on the plan statistics sheet. Please clarify?

Answer: We compared the two and found them to be the same. Please let us know if you have a more specific question.

Question #17. Please share your SBC (summary of benefits)

Answer: The “BCBS Medical plans” document should suffice. If there is specific information that is available in the SBC that you are unable to find in the BCBS Medical plans please let us know.

Question #18. Please share your renewal notice.

Answer: We don’t have a renewal notice for 2019. Our plans renew in July. We will look up our 2018 renewal notice and share if appropriate. If there is something specific in the renewal notice that is critical for your proposal, please let us know what that is.

Question #19. Please share your most recent invoice.

Answer: We will add our most recent invoice to the documents in the shared folder.

Question #20. Please share your workers comp deck page.

Answer: This has also been added to the folder.

Question #21. Please share your Loss history.

Answer: We are assuming this is referring to our workers comp loss history. We will post in the shared folder.

Question #22. I was curious if NonProfit HR is engaged to work with the school only for the RFP or if you’re supporting their HR department more broadly and on an ongoing basis.

Answer: Nonprofit HR is currently partnering with FirstLine Schools to provide additional support related to the RFP process.

Question #23. The RFP mentions OSHA compliance as a characteristic you need the ATS/HRIS to handle. Can you clarify what you mean specifically? What OSHA regulations does the school need to track?

Answer: We are interested in being able to track and/or upload employee acknowledgement of workplace safety and health related trainings (i.e. first aid, emergency action plan/exit routes, hazard communication, vehicle safety). In addition, we are interested in having the option to track any employee requests for OSHA inspection and/or workplace injury logs. We would like the functionality to provide OSHA related acknowledgements and safety plans as part of online onboarding process as well as retain online for employee access via self service features.

Question #24. For “credential verification” what specifically is needed? Is this needed for all staff members or a subset of staff members?

Answer: We need a place to capture what certifications our teachers have and also capture any additional credentials that any other staff members may have. This would ideally be available for all staff, but would likely only be utilized for a subset of staff members.

Question #25. How does your current background check process work? Do you use a state entity to conduct background checks or a third party vendor?

Answer: We currently run background checks through the [Louisiana Sheriff's Association Civil Inquiry Network](#). New employees go to their in-town location (this is currently in New Orleans), have fingerprints taken, and we complete the necessary information via their web portal, which is where we also download results, once they are available.

Question #26. What trainings are required for your staff? How are those trainings conducted right now? Do you use central office staff to conduct trainings or a 3rd party vendor?

Answer: This depends on the staff members. The majority of our trainings are conducted by in-house staff (generally central office staff), but for some topics we do bring in outside expertise (for example - CPR training is conducted by an outside expert). All staff are mandatory reporters and are trained on that topic at least annually. Additionally, we have staff trained in Crisis Prevention Intervention (CPI), CPR, HR Policies and Procedures, Sexual Harassment, Risk Management, how to properly handle student data, and a variety of other topics.

Question #27. How are you defining "job costing?" Can you give us an example of a job costing scenario at one of your schools? I want to make sure we get the right reports.

Answer: We are defining job costing as the ability to have easy access to reviewing job placement details to include position assignment(s), pay rates per assignment, full-time equivalent counts (FTE), function object codes, and site locations. This data would support the management of current and projected budgets.

Question #28. How is the current HR team set-up at Firstline? Is HR run 100% through the Central Office or are there HR people onsite at each school? What level of HR support is ideal for the organization?

Answer: The current HR/Talent team (these are two departments that work very closely together) is staffed through the following positions: Director of HR, Director of Talent, HR Generalist, HR & Talent Coordinator, Recruitment Manager and Talent Manager. These positions are all based at the Central Office. Additionally, the HR Team has regular, weekly check-ins with the School Operations Managers who conduct some HR duties onsite at the schools (like offboarding) as needed. As for what level of HR support is ideal for the organization, we want to ensure the service to our employees remains at least the same, but ideally increases through this process.

Question #29: In order to complete a true apples to apples comparison for FirstLine Schools, Inc., we will need to collect the following information for the pricing piece of the RFP:

- 1) Confidential Business Profile (attached)
- 2) Group Health History Questionnaire (attached)
- 3) New Client Risk Review Questionnaire (attached)
- 4) Cafeteria Plan Questionnaire Worksheet (attached)
- 5) Census gaps:
 - First/Last Names
 - Job Titles (teachers, paraprofessionals, building services professionals, and administrators)
 - Work States (all based in LA but 1 works remote from Florida – which one?)
 - WC Comp Codes
 - Wage Cap?
 - Status (FT/PT)
 - Average Work Hours Per Week
 - Wage Type

- Coverage Group/Level for Medical
- Dental/Vision

Answer: All vendors should be able to provide initial quotes from carriers based upon the information that has been shared. Vendors should provide best estimates based upon the data and documents that have been provided. Vendors should highlight potential contingencies/areas that may require additional information for a final quote. For this public RFP process, FirstLine will not be completing any proprietary documents, but will provide as much data as is possible. The census sheet has been updated with the following information: work states, FT/PT, and Job Titles. The other data should be present in Worker's Comp policy pages and Medical utilization information that has been shared. First and Last names have been removed, but employee numbers should be consistent throughout.

Question #30: We need the following information:

- Most recent Ancillary Benefit Billing Invoices with details of employees and elections – Dental, Vision, Life, Disability.
- Most Recent Medical Billing Invoice and One Medical Billing Invoice from Prior Plan Year.
- 2 Years of Medical Claims / Loss History (starting with last month) – Please include employee participation count per month (provided by carrier/broker).
- 2 Years Large Claim Analysis. Please include diagnosis, dates, amount(s). No names or personal information is required.

Answer: All vendors should be able to provide initial quotes from carriers based upon the information that has been shared. Vendors should provide best estimates based upon the data and documents that have been provided. Vendors should highlight potential contingencies/areas that may require additional information for a final quote. Please see question 1 for the provided documents that are in the folder, this list has expanded.

Question 31: Need a report listing most current 4 years of WC claims / loss runs (provided by carrier/broker). We received 08.01.18 – 11.15.18. We need 11.15.14 - 07.31.18 to complete the 4 years required.

Answer: All vendors should be able to provide initial quotes from carriers based upon the information that has been shared. Vendors should provide best estimates based upon the data and documents that have been provided. Vendors should highlight potential contingencies/areas that may require additional information for a final quote. We have added a WC loss run for FY15-YTD FY19.

Question #32: I would also like to make note that our corporate headquarters will be closed November 22nd and 23rd in observance of the Thanksgiving holiday. A standard turnaround for pricing would be 4-5 days. Given the holiday, I would like to kindly ask for an extension of at least Wednesday, November 28th.

Answer: We will extend the due date for all PEO RFP proposals to 3pm on Wednesday, November 28, 2018.