



**Question & Answers from PEO RFP Process**  
**Questions due Friday, November 16, 2018 by 3pm**  
**Draft version of document, posted November 16, 2018**  
**Final version to be posted by 3pm on November 21, 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, Past Year Loss Utilization Report (to be added by 10am Tuesday, November 21), Benefits Utilization Report as of March 2018, Current Census Data (in both pdf and excel), Recent benefits bill (to be added by 5pm on Monday, November 20), Worker's Comp Declaration pages, and current Worker's Comp loss run.

**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.