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Healthcare Benefit  
**Choices**



# OAHU

## ADMINISTRATIVE SERVICES RFP

### Request for Proposal Description

The Ohio Association of Health Underwriters (OAHU) is seeking proposals from qualified organizations to provide diverse administrative services for its state and local chapters. The administrative service details can be found in the Scope of Services section of this RFP.

### RFP Schedule and Contact Information

RFP Released- July 9, 2014  
RFP Sealed Responses Due- September 1, 2014  
RFP Finalist Announced- January 1, 2015  
RFP Effective- June 1, 2015

Please direct questions and sealed Responses to:

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Please include ten hard copies of your response in a sealed envelope and clearly mark the envelope **OAHU RFP**.

## OAHU Background

The **Ohio Association of Health Underwriters** supports its local associations in promoting free-market delivery of health care and the value of the professional agent.

OAHU Members adhere to a strict Code of Ethics. OAHU requires each of its members to make health care coverage recommendations with the consumer's best interests in mind. Professional insurance agents strive to provide their clients with the best possible service and price for their insurance products.

OAHU consists of the state organization and five local chapters located in Cincinnati, Cleveland, Columbus, Toledo, and Youngstown. Each has an independent board and meeting schedule. State meetings are usually held in Columbus.

## OAHU Goals and Objectives

**Mission Statement:** The Ohio Association of Health Underwriters exists as a resource to the local Ohio Chapters in the areas of communication, legislative advocacy, membership, leadership and position training, and shared programs.

The primary objective of this RFP is to provide a core level of highly competent and cost-effective administration for our state and local chapters. Our goal is to create a meaningful synergy through the organized sharing of information and ideas via enhanced communication and linkage on the part of all six chapters.

## Basis for Award of the Contract

OAHU reserves the right to accept or reject any bid deemed to be in the best interest of OAHU. This RFP is designed to contract for administrative services only. The OAHU Board provides overall direction and decisions on business matters through a well-planned decision-making process.

In addition to your bid response, please see Addendum "A" for an additional Responding Organization Questionnaire.

## Structure of Services being requested

The **core services package** listed below shall be provided to the state and all local chapters under a single agreement and fee structure.

The **meeting and accounting services packages** contained within this RFP are required only for the state chapter, however, it is to be offered by applicant as an optional service and cost that local chapters may choose independently.

## **CORE PACKAGE SCOPE OF SERVICES**

### **The maintenance of a permanent office address**

- A main directory listing in the building indicating all chapters in which you are providing services
- The use of the address on all printed and collateral materials
- Administrator-provided computers, current software and trained, professional employees
- A permanent phone number and appropriate telephone services are to be provided by the administrator at their expense
- A toll-free telephone number attended during normal business hours, Monday through Friday
- A telephone procedure and answering device to retrieve messages
- Ability to respond in a timely manner to requests from members for information
- Ability to respond to individuals inquiring by phone for information regarding mission, formats, future meetings, member information *et al*

### **Centralized database management**

- The maintenance of a HIPAA-Compliant Data Security and Backup Policy
- Ability to convert and store all requested data to a HIPAA-Compliant Centralized System and Format
- The maintenance of a HIPAA-Compliant Records Retention and Access Policy

### **Communications via US mail, fax, and e-mail**

- The distribution of all received mail to state and local officers and others as needed
- The ability to process reservations and payments for meetings by check, credit card or online
- The updating of addresses, company affiliations *et al* as received from any and all bona fide sources/ members, mail services or national office
- The adding of new prospects from varied sources including phone calls, referrals, national office *et al*
- Maintaining the current status Outlook email groups (OAHU Board, local presidents/presidents-elect and committees)
- Managing all bounce backs and opt outs
- Updating email lists for broadcast email
- Providing the capability to broadcast e-mail and mass mailings
- Designing, typesetting and the obtaining of cost quotations for printed materials required during the course of the year including but not necessarily exclusive of membership postcards, brochures, invitations, communication materials *et al*

## **Web Maintenance**

- Web Maintenance includes two state websites – and all local websites
- The updating of all websites and directories as requested by Presidents and the Communications Committee.
- The establishing of continuity in terms of a uniform look, layout and links for all websites
- Maintaining up-to-date calendars for all local and state events
- The submitting of [ohioahu.org](http://ohioahu.org) for the NAHU website award, observing all award criteria
- Providing social media support (Facebook, LinkedIn and text notifications)

## **Membership**

- The processing of membership information received from the national office, including monthly updates to the database with current information on renewals and new members for all chapters
- The providing of local membership chairs with prospective membership and new-member packets
- Working with the OAHU state membership chair on the organization's annual membership campaign

## **Inventory**

- The monitoring of inventory, the seeking out of sources and obtaining competitive pricing for required supplies including letterheads, envelopes and other communication materials, name tags, gifts *et al* in accordance with OAHU's current Office Expenditure Policy and Procedure.

## **Continuing Education**

- Submitting new CEs (compiling all necessary paperwork)
- The reporting of NPNs for completed courses
- Renewing of annual CEs with the Ohio Department of Insurance, working with CE chair to determine which CEs should be renewed and the preparing and submission of paperwork as well as payment

## **Public Relations**

OAHU news will be submitted to all local publications. Examples include:

- OAHU special events
- Day at the Statehouse
- Local events and programs as required
- State programs
- State's new officers
- Others as deemed necessary

### **Strategies for fulfilling the mission, vision, and values of OAHU:**

- The providing of professional service to OAHU membership
- Maintaining a dialogue between the state and national offices
- Assisting with the organization's strategic planning event every three to five years (as well as obtaining an appropriate venue)

### **Bylaws, Policies and Procedures**

- Providing assistance with the updating of bylaws, policies and procedures and assist the Board with compliance of these important documents

### **OAHUPAC-State/HUPAC-National (Political Action Committees)**

- Collaborating with the organization's lobbyist in the distribution of Legislative Week in Review and its posting on the OAHU website
- Assuring OAHUPAC/HUPAC member lists are up to date for emails and meetings
- Providing local OAHUPAC chairs with contributor fliers to be placed on tables at monthly meetings.
- Assisting with the maintenance of current contributor applications on the website
- Assisting with the annual campaign, if applicable

### **OAHU Newsletter**

- The creating, producing and mass emailing the OAHU newsletter under the direction of the OAHU Board of Directors
- Working with the organization's Legislative Chair and local boards on the updating of membership regarding Legislative OAHUPAC and HUPAC activities

### **Marketing and Reporting on Endorsed Vendors Programs**

- Coordinating annual meetings to review past year's participation and income report and statistics with endorsed vendors
- Assisting in the identification of endorsed program opportunities
- Working with reps on ways to encourage OAHU members to participate in the program
- Completing and filing all forms to maintain compliance and active status of programs
- Arranging for annual training for specific programs
- Preparing and sending out monthly email to encourage membership participation
- Updating all materials for OAHU and local chapter websites, monthly communication to members and membership packets

### **Tracking and Reporting on Leading Producer Roundtable, LPRT**

- Posting and notifying board members regarding LPRT deadline
- Reminding board members about the opportunity to be reimbursed for a portion of LPRT costs

### **Chapter Certifications**

- Work with the state and local chapters in the securing of their respective NAHU certification.
- Submit awards applications to NAHU Awards Committee

### **History of Association**

- Maintaining all current information and posting of all updates to the chapters' website and database.

**Other duties as mutually agreed upon between the OAHU Board of Directors and administrator.**

# **MEETING PACKAGE SCOPE OF SERVICES**

## **Board/Executive Committee Meetings**

- Setting and distributing annual board meeting calendar to designees and posting same on the web
- Obtaining a location for all in-person meetings
- Notification and arranging of conference call and/or virtual meetings with board members and others.
- Working with the board president on the agenda
- Sending board meeting announcements and reminders as well as recording reservations and the obtaining of reports
- Preparing the financial report
- Distributing board packets, including prior minutes, financial reports, committee reports, etc., prior to the meeting and bringing the necessary number of copies to in-person meetings
- Attending all in-person board meetings (eight to nine) and conducting virtual meetings on the other months
- Working with local chapters on updating their board lists and delegates for monthly OAHU meetings
- Taking and publishing meeting and event minutes
- Act as Parliamentarian at all meetings following Roberts Rules of Order

## **Arrangements for Conference Calls and/or Webinar Communication**

- Maintaining [ohioahu.org](http://ohioahu.org) as the e-mail address for the organization
- Reviewing and responding daily to e-mail messages
- Preparing OAHU newsletter and posting same to website
- Updating Facebook at least once weekly and additional times during events and maintaining an ongoing LinkedIn presence

## **Legislative and Special Committees**

- Setting and distributing the annual meeting calendar as well as posting the information on the web
- Providing assistance to committee chairs, sending out notices of committee meetings, reserving venues and/or arranging virtual meetings
- Sending e-mail task reminders to committee members.
- Sending meeting announcements and reminders to attendees and making reservations and obtaining reports
- Distributing meeting packets prior to meetings
- Obtaining Legislative Committee meeting minutes for OAHU's permanent record file

### **Annual Meetings and Expos**

- Obtaining a location and menu *et al*
- Creating invitations
- Tracking attendance
- Tracking and coordinating vendor sponsorships
- Taking photographs and posting to websites
- Working with the OAHU President on board nominations, agendas and awards provided at annual meeting
- Preparing materials for elections, provide assistance to determine election results and document such results

### **Leadership Training: (State Chapter Only)**

- Working with incoming OAHU President on the agenda
- Working with OAHU committee chairs for training materials
- Developing all training materials and posting same on website

### **Day at the Statehouse (State Chapter only)**

- Submitting for CE and recording National Producer Numbers after events
- Assisting the OAHU lobbyist with arranging for a venue and menu
- Reserving block of rooms
- Preparing required materials
- Arranging for audio/visual equipment and handouts, etc.
- Working with Lobbyist to obtain schedule of appointments
- Preparing folders for attendees and legislators in conjunction with the OAHU Legislative Committee and the organization's lobbyist

### **NAHU Capitol Conference (State Chapter Only)**

- Posting of Capitol Conference dates on all websites
- Distributing Capitol Conference dates to locals
- Reserving block of rooms
- Assisting with obtaining roommates
- Sending out notices indicating end date for early bird registration

### **NAHU Symposium (State Chapter Only)**

- Posting of NAHU Symposium and Early Bird Registration date on all websites
- Reserving block of rooms
- Assisting with obtaining roommates
- Assuring all locals have submitted their delegates
- Working with president on OAHU's delegation
- Submitting to NAHU any members who have passed away during the year
- Submitting to NAHU any awards received by members



# **ACCOUNTING PACKAGE SCOPE OF SERVICES**

## **Bookkeeping**

- Paying bills under direction of the treasurer or authorized board member
- Processing expense reports
- Preparing and making deposits
- Preparing invoices
- Reconciling checking account
- Preparing monthly financial statements
- Maintaining contact with the OAHU Treasurer and President so expenses are placed in correct line item.
- Providing records to the auditor as requested by the board
- Coordinating with OAHU Board-approved accountant in preparation of Form 990

# **Responding Organization Questionnaire**

## **Addendum A**

- List any and all value added services our membership will receive by working with your organization.
- Please provide proof of insurance and bonding.
- Please provide the number of years your organization has been in business.
- Please indicate the number of clients your firm presently serves.
- Please delineate the number of employees on your staff.
- Please indicate your employee names, background, experience and roles that would be assigned to our organization.
- Provide other statewide association or related references.
- Please list any experience in working with insurance related organizations.
- List your firm's key media outlets and statewide PR experience.
- Please list any administrative designations or awards your organization or individuals have obtained.
- Please provide a copy of your HIPAA-Compliant Data Security and back-up plan.
- Hourly rate outside the scope of services.