**ATTACHMENT D**

**CONSULTANT QUESTIONNAIRE**

Please submit answers to ALL questions. Use additional sheets if necessary

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| **Question** | **Response** |
| 1. Has your firm established any limitation on the  number of clients you intend to accept? What is your  client to consultant ratio? |  |
| 2. Describe your plans for managing the future growth of your firm. |  |
| 3. Does your firm have any conflict of interest policy? If so, please provide a copy. Also, please describe any conflicts that have arisen within the firm and how they were resolved. |  |
| 4. What are three to four key things we should look for when hiring a consultant? |  |
| 5. What is your firm's policy/standard for returning:  • Phone calls?  • E-mails or written questions? |  |
| 6. Provide two examples of when you have provided  services that have gone beyond the "spirit of the  contract" (pro bono work). |  |
| 7. Give two examples that demonstrate your firm's  ability to be proactive in finding opportunities to  enhance services to the client. |  |
| 8. If you are the successful new consultant, outline your transition plan with dates, tasks and responsible  parties. |  |
| 9. How many days of advance notice would your  company require in order to attend ad-hoc  (subcommittee) meetings? |  |
| 10. How do you track and communicate legislative  updates to your clients? Provide a sample of  legislative updates. |  |
| 11. How do you track and communicate industry trends to your clients? Provide a sample of industry trend updates. |  |
| 12. Describe how your firm would handle ad-hoc projects that arise due to changes in legislation or other events which create additional service needs for the City. |  |
| 13. Provide an example that demonstrates your firm's ability to be proactive in finding opportunities to enhance benefits and services. |  |
| 14. Provide examples that demonstrate your firm's  negotiation skills to bring down costs. |  |
| 15. Should your firm engage the service of a  subconsultant for the City's account, provide the firm's name/names, relevant experience and contact  information for the persons who would be the primary and secondary contacts for this engagement, and copies of their biographies/resumes. |  |
| 16. For the above subconsultant(s), list the current and past professional affiliations, including boards and committees. Include positions held and years of  membership. |  |
| 17. Would the subconsultant's primary and secondary contacts for this engagement make decisions on behalf of your firm? |  |
| 18. Tell us how you monitor and report on provider  performance. Provide a sample of provider  performance reports your firm has completed for  current clients. |  |
| 22. Do you have access to a benefits attorney who could render opinions to the City? If so, please provide the cost for this service. |  |
| 23. For benefits plans (such as Life, Short-/Long-Term Disability and Accidental Death and Dismemberment Insurance) that require completion of claim forms to obtain benefits, what services does your firm provide for assisting eligible participants in filing for and obtaining plan benefits? Please provide the cost for this service. |  |
| 24. What services does your firm provide for developing Open Enrollment and New Employee Orientation materials? Please provide a separate cost for each program (open enrollment and new employee orientations). |  |
| 25. What service does your firm provide for developing a Wellness Program? Please provide the cost for this service. |  |
| 26. Are there any other relevant consulting services that are not listed that you will provide as part of your consulting services to the City? Please provide the cost for these services. |  |