

City of Charlotte Life and Accidental Death & Dismemberment Insurance RFI/RFP

Bid Number: 269-02272025

February 27, 2025

We are conducting a market survey on behalf of our client, the City of Charlotte, for the following coverages and administration:

- Basic Life
- Basic AD&D
- Supplemental Life
- Supplemental AD&D
- Supplemental Dependent Life

The City of Charlotte currently offers Life coverages through Symetra.

Before the RFP will be issued to your organization, you will be required to complete the below RFI questionnaire. If approved by the City of Charlotte and Willis Towers Watson, your organization will be issued the complete RFP for submission.

**RFI Questionnaire:**

1. Do you currently exchange eligibility data with Alight?
2. Are you able to manage EOI electronic transmission?
3. Will your organization provide a flat multiple year rate guarantees for no less than 3 years with 2 additional one-year renewal options?
4. Please confirm if your organization will provide an implementation, plan build audit, communication, and/or technology funds.
5. Please respond to the following questions regarding Data Breaches:
  - a. Has your company had a data breach? If so, when?
  - b. How many data breaches have occurred in the last 5 years?
  - c. How many lives were impacted?
  - d. Was the breach internal or due to a business partner?
6. Will your organization abide by the City's root cause analysis documentation standards (attached) and place service performance guarantees around implementation response time and issue resolution? Please confirm your organization will not require a separate agreement to enter into PG's with the City as a fully insured plan.
7. Please confirm that your organization will not offshore any City data or if there is a cost associated with on-shoring all City data.
8. Please confirm that all of your customer service/call centers are onshore or if there is a cost associated with on-shoring CRS capabilities.
9. Please provide S&P, AM Best, Moody's Rating

Responses to the RFI questions above are due by **Friday March 7, 2025 at 5pm**. Proposals and the completed RFP responses are due by **Friday, March 21, 2025**. Please note that no extension will be provided after the due date.

If your organization is selected, you will receive the full RFP on **Monday, March 10, 2025**, and enclosed will be the following information:

- 1) RFP (see tabs across the bottom)
- 2) Census (password to be sent separately)
- 3) Experience

**Please read through the RFP in its entirety.** Should you have any questions concerning any of the requests, or additional information is needed to release a proposal, please submit **all** questions no later than **Wednesday, March 12, 2025**. A comprehensive Q&A document will be provided to all selected vendors by **Monday, March 17, 2025**.

Please submit all questions to Willis Towers Watson:

Name	Email	Phone
Ronnie Nelson	<a href="mailto:Ronnie.Nelson@wtwco.com">Ronnie.Nelson@wtwco.com</a>	+01 704 804 1458
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## **DO NOT CONTACT THE CITY OF CHARLOTTE DIRECTLY**

### **DISCLAIMER:**

The City of Charlotte is a subdivision of the State of North Carolina and is, therefore, subject to the North Carolina Public Records Act (the "Act") at N.C. Gen. Stat. 132-1 et seq. Confidential information that is a public record under North Carolina law may be released and disclosed by the City pursuant to the Act. Notating your entire RFP response as confidential and proprietary does not supersede the statute.

**Please note that this is not a Brokerage Services RFP. Your organization must be an admitted service provider in the State of North Carolina.**