**EXHIBIT C: QUESTIONNAIRE**

This Questionnaire addresses the major aspects of the Court’s employee benefits consulting and actuarial service needs. Answer only the questions asked, and refrain from making references to other preprinted materials, marketing and sales types of information. Your responses must relate to the facts requested. Your responses must reflect your firm’s current personnel.

Have appropriate personnel answer each question. The accuracy and completeness of this information will be weighed heavily in the considerations of the evaluation of the responses. For questions that do not pertain to your firm as specified in Exhibit A: Statement of Work, respond to the question with “Not Applicable.”

1. What is the service area of your company? Please provide a listing by state and city.
2. If more than one office would be providing services to the Court, describe what services would be provided at each location.
3. Which location would be the primary office to service the Court’s account?
4. How long has your firm provided consultant services for health plans? Please briefly describe the type of health plans you have serviced.
5. How long has your firm provided consultant services for welfare (e.g., Life insurance, short and long term disability, etc.) plans? Please briefly describe the type of welfare plans you have serviced.
6. Describe your firm’s experience that substantiates it meets the minimum requirements as set forth in Section 1.0 Background Information, Sections 1.1.2 through 1.1.4. How many clients do you currently service in the public sector? Are any of those clients other courts?
7. Please list how many clients, both public and private sector, for which you currently provide consulting and/or actuary services, which offer the following plans to their employees and/or retirees.

**Plan Provider Number of Clients**

Kaiser Permanente Health Plans

Blue Shield of California HMO Plans

Blue Shield of California PPO Plans

Dental Plans

EAP Plans

Flexible Spending- Health Care and Dependent Care

Securian Financial (life insurance)

The Standard (Disability)

EyeMed (vision)

1. List any services stated in Exhibit A: Statement of Work that you would not be able to provide.
2. Are there areas of service that were not designated in Exhibit A: Statement of Work that you would recommend to be added to the services your firm would provide to the Court?
3. Outline your firm’s ability to provide expertise and experience in the areas of long range strategic planning for health and welfare benefit planning purposes. Describe in detail the types of analyses your firm has conducted relative to long range strategic planning for employers with at least 1,000 employees.
4. Outline your firm’s ability to provide expertise and experience in the areas of health benefit plan analysis and design. Describe in detail the types of analyses your firm has conducted relative to benefits analysis and design for health plans with at least 1,000 employees.
5. Outline your firm’s ability to provide expertise and experience in the area of dental plans. Describe in detail the types of analyses your firm has conducted relative to benefits analysis and design for these types of plans offered by employers with more than 1,000 employees.
6. Outline your firm’s ability to provide expertise and experience in the areas of welfare benefit plans (e.g. life insurance plans, accidental death and dismemberment (AD&D) plans, disability plans, vision plans, long term care plans, etc.). Describe in detail the types of analyses your firm has conducted relative to benefits analysis and design for these types of plans offered by employers with more than 1,000 employees.
7. Outline your firm’s ability to provide expertise and experience in the area of employee assistance plans (EAP) and programs. Describe in detail the types of analyses your firm has conducted relative to benefits analysis and plan design for this type of plan.
8. Outline your firm’s ability to provide expertise and experience in the area of employee wellness programs. Describe in detail the types of analyses your firm has conducted relative to wellness and the resources available to help the Court expand its wellness program.
9. List any characteristics of your firm that you feel make it unique from other employee benefits and/or actuarial consulting firms.
10. Describe your firm’s legal research capabilities and ability to provide legal opinions.
11. Please list any potential conflicts of interest, beyond the restrictions regarding contracting with former employees (see Attachment 4: General Certifications), that your firm foresees if you are selected as the successful Bidder, or state affirmatively that you foresee none.
12. Are you owned by or does any insurance company have part ownership in your firm? If so, please detail all such relationship(s).
13. Do you agree that the work you complete under any agreement awarded cannot be copyrighted?
14. Do you agree that all work completed under any agreement awarded is considered property of the Court? See Attachment 2: General Terms and Conditions/Defined Terms Section 4.1.
15. Do you agree to give the Court the right of approval of any staff member assigned to this account? See Attachment 2: General Terms and Conditions/Defined Terms Section 1.6 (a) and (b).
16. Have any of the principals of your firm ever been named in a lawsuit for consulting services similar to the consulting services requested by this proposal? If so, please provide details.
17. If your firm is selected as a “finalist,” would you be willing to submit samples of work that you produced for other large employer groups that relate to the Court’s benefit programs? If not, please explain.

*End of Exhibit C*