

## **Life Insurance Program Bid Process 2003/2004**

Updated through 10/04

- **March 23, 2003:** Request for Information (RFI) Posted for Life Insurance Program. This RFI welcomed joint responses from carriers and brokers
- **May 30, 2003:** Life RFI Posting Closed. 20 responses received;
- **June 9, 2003:** Committee on Group Insurance Programs (COGIP) Quarterly Meeting. Evaluation Sub-committee (“Sub-Committee”) was asked to develop draft of Life RFP
- **June 24, 2003:** Sub-Committee Meeting
- **July 15, 2003:** Sub-Committee Meeting
- **September 8, 2003:** COGIP Quarterly Meeting. COGIP agreed to have RFP decision placed on hold until after “Joint Venture Committee” meeting November 2003.
- **January 12, 2004:** COGIP Quarterly Meeting. Approval granted to Sub-Committee to move forward with Life Insurance Broker RFP
- **January 30, 2004:** Sub-Committee Meeting
- **March 1, 2004:** Life Insurance Broker RFP Posted
- **April 29, 2004:** Life Insurance Broker RFP posting closed. (8 responses received);
- **May 7, 2004:** Sub-Committee Meeting—official voting participants and process to be followed identified
- **May 17, 2004:** Sub-Committee Meeting---4 bidders identified for Bidder’s Conference scheduled for 06/02/04
- **May 28, 2004:** Additional questions mailed to invitees of the Bidder’s Conference;
- **June 2, 2004:** Bidder’s Conference at State Bar’s San Francisco Office (all day)
- **June 4, 2004:** Sub-Committee Conference Call—List narrowed down to 2 final bidders;
- **June 28, 2004:** COGIP Quarterly Meeting. Final two bidders asked to present to full Committee.

- **June 29, 2004:** Confidentiality forms distributed and collected from two final bidders
- **July 1, 2004:** State Bar Life Insurance Program financial information and carrier agreements shared with remaining bidders.
- **July 8, 2004:** Final dialogue with each broker (separately) --after opportunity to review material provided on 07/01/04.
- **July 12, 2004:** Final proposals collected
- **July 15, 2004:** Sub-Committee meeting--final score sheet submission
- **July 16, 2004:** Email poll conducted for COGIP—seeking approval of final recommendation to the Board of Governors
- **July 23, 2004:** Final recommendation presented to the Board of Governors (closed session) for approval of replacement of existing Life Insurance Program Broker.
- **September 2004:** Broker is notified of appointment
- **October 2004:** Contract discussion and negotiation begin with broker