

Gallagher Benefit Services, Inc.

Submitted April 22, 2021 – 11:32 a.m.

Date of Contact	Person Spoken To (including Title)	1. Can you describe the project or work that Gallagher Benefit Services, Inc. has completed for you? Please describe the level of detail Gallagher Benefit Services, Inc. has provided in completing its work/project.	2. Was Gallagher Benefit Services, Inc. responsive, accessible and available to you throughout the term of the project/work?	3. Are you satisfied with the work performed?	4. What are Gallagher Benefit Services Inc.'s strengths and conversely what are Gallagher Benefit Services, Inc.'s weaknesses?	5. Have you encountered any problems with Gallagher Benefit Services, Inc., or had any contract or billing issues with Gallagher Benefit Services, Inc.?	6. Would you recommend Gallagher Benefit Services, Inc. to other entities for similar work? If you need additional services in the future, how likely are you to choose Gallagher Benefit Services, Inc. again?	7. Are there any important questions I should have asked but didn't?
04/22/2021 Provided written response via email	LaShonda Walls Director, Benefit & Wellness - Talent Experience Fort Bend Independent School District Sugar Land, TX	<p>As one of the few school districts that still manage a self-funded plan, it is extremely important that we have consultants that are familiar with policies of not just a public entity but also a school district. Gallagher Benefits brings us comfort in knowing we are always informed of changes in federal laws, especially considering today's environment. Their compliance team does a great job of providing timely information relative to policy changes. While our plan is not subject to ERISA, they still share compliance information related to those plans in case it is something we want to consider. In addition to regular webcast, they offer a client online tool that is extremely helpful when looking for quick compliance information. Being a public sector entity, having access to a compliance team that can provide more in-depth assistance when compliance issues arise is extremely helpful.</p> <p>In addition, Gallagher Benefits has access to a comprehensive database that allows for easy benchmarking against industry peers. As a public entity, it is important that we have data to back up our recommendations. On a monthly basis, Gallagher meets with our team to provide a financial analysis of our plan performance. There is also an annual strategy meeting with District Leaders to discuss the state of the plan and Gallagher provides recommendations for the upcoming benefit plan year. When Gallagher Benefits assumed the consultative role with the District, we were experiencing a slight deficit in our medical plan. Going into 2021, we were at a surplus. While there are a number of factors that played into this turnaround, one of them has to do with the medical plan strategies they recommended in 2020 and additionally for 2021. Gallagher Benefits is very focused on the long-term success of the plan.</p> <p>Gallagher Benefits also stays abreast of what is going on in the industry and is able to provide in-depth data analyses of our industry peers. Managing our plan at a surplus level is important because it allows us to provide a mix of high quality products and services at an affordable cost to our employees and their families. Gallagher Benefits brings that consultative strategy to the table. They have successfully assisted us through some of our largest RFPs (medical, stop loss, ancillary, etc.). They managed this process from beginning to end, including RFP template creation, RFP strategy meetings, RFP finalist meetings, and support during school board meetings. Open enrollment is the most important season for our Benefits and Wellness Department. With over 11,000 employees, communication is critical during this time. Gallagher Benefits assists the District with its communications strategy by providing a resource team that assists with creating all of our communication materials for the open enrollment period.</p>	As part of our arrangement with Gallagher Benefits, we have an Account Executive (AE) and Account Coordinator (AC) that works very closely with me as the daily contact. The level of service provided in these roles is extremely supportive. The AC meets with me weekly and manages a weekly log to make sure the District stays on task with the various requests from plan sponsors. The AE acts as a direct point of contact for any questions or concerns I have. This person also acts as a liaison with plan sponsors. The goal of this person is to make sure plan sponsors are meeting the needs of the District and to make sure regular meetings are scheduled for them to provide updates on the Districts plan performance specific to their products and services. The AE also assists with managing the monthly Benefits and Wellness Committee Meeting which includes over 125 employee representatives from the various FBISD campuses and departments.	Yes, we are extremely satisfied.	Gallagher Benefit Services Inc.'s strength is their ability to provide industry specific competitive and benchmarking data. The level of service and commitment that provide their clients is also a strength. Based on our current experience with Gallagher Benefits, I honestly cannot provide a weakness. They provide excellent consultative services.	No, we have not experienced any contract or billing issues with Gallagher Benefit Services, Inc.	Yes, we highly recommend Gallagher Benefit Services, Inc. We are also very highly likely to choose Gallagher Benefits Services, Inc. for future services.	No. Your questionnaire allowed me to expand on our relationship with Gallagher Benefits Services, Inc.