

REQUEST FOR INFORMATION



STATE BAR OF CALIFORNIA **SPONSORED AFFINITY PROGRAMS AND PRODUCTS**

This is a Request for Information (“RFI”) for administrator management groups interested in becoming the provider of member programs and products for all State Bar sponsored affinity programs and products (“AP&P”). This service will not include providing administrator management for the State Bar’s existing sponsored insurance programs. “Affinity” refers to all programs and products other than insurance programs and products.

I. INTRODUCTION

The State Bar of California is seeking indications of interest from administrator management groups for member programs and products interested in serving as the administrator manager for its more than 200,000 members – consisting of all the lawyer admittees in California. Approximately 5,000 new members are added to the State Bar’s admittee rolls each year.

The State Bar is looking to put in place a highly competitive and value added portfolio of AP&P that would meet the changing needs of its membership during various stages of their careers and lives. The State Bar seeks to provide programs and products offering advantages to the members, their families not generally available as “street products” that members could easily purchase as individuals on their own, through agents and brokers, direct channels, or via the Internet.

The State Bar is seeking to encourage innovative approaches by qualified providers to meet the State Bar’s objectives for the AP&P.

As the State Bar is a constitutional agency established as a public corporation in the judicial branch of California’s state government, the process of selecting an administrator management group is necessarily subject to various formalities. The State Bar of California will not be awarding a contract as a result of this RFI, although the State Bar intends to work with interested and qualified administrator management groups to facilitate the RFI / RFP process.

The following pages list a series of questions, designed to help the State Bar understand your organization’s capability and willingness to provide a the service described that meets the State Bar’s objectives. Based on the responses to these questions, a more select group of administrator management groups will be targeted with respect to a formal request for proposal.

The State Bar is authorized to seek funding other than member dues revenue pursuant to Business & Professions Code 6001 (g) and 6140.9, to fund the Lawyer Assistance Program and other programs. Have you provided sponsorship fees or royalties to other clients as part of cooperative working agreements? If so, how much and under what circumstances?

II. SUBMISSION REQUIREMENTS

The submission requirements for the RFI are detailed below. Please submit two (2) copies of your response to the address listed in Section V below. Please clearly mark your response as REQUEST FOR INFORMATION – STATE BAR SPONSORED AFFINITY PROGRAMS AND PRODUCTS. All information presented by the State Bar in this RFI, including information that is subsequently disclosed by the State Bar, should be considered strictly confidential. Information should not be released to external parties without the written consent of the State Bar of California.

Responses to the RFI must contain the following information:

1. A brief statement as to whether your company has provided administrator management of programs and products to other associations, organizations, companies, groups and/or governmental units where the target market consists of highly qualified professionals. If your company currently serves as the administrator manager for such plans, a brief description of the most relevant programs, and a brief summary of such programs' experience would be particularly helpful.
2. The most recent ratings of your company (and its parent, if any) from such agencies as A.M. Best, Standard & Poor's, Moody's, Weiss, etc.
3. Responses to the points in Section III of this RFI. Although it is not required that you address every point, as the responses will assist the State Bar to determine the level of interest, we encourage you to at least briefly address each item.

III. QUESTIONNAIRE

The purpose of these questions is to assist the State Bar to determine if your company is likely to be willing and able to put together, on its own, or in partnership with other administrator management groups the type of flexible program that the State Bar envisions could best serve the needs of members and the State Bar. We would also welcome any other information and suggestions you may choose to provide.

1. The State Bar is interested in distribution alternatives that go beyond the current direct response mail approach. Please briefly describe your company's ability to offer programs and products using multiple techniques, including use of the Internet.

2. We understand that successful AP&P generally offer substantial pricing advantages to members over “street products”. What approach do you use in pricing association products, and what has been your experience in terms of expense charges between individual and group?
3. Is your company willing to separate out charges for marketing and other services to facilitate measurement of the success of marketing efforts based on costs per paid for policy? Is your firm willing to handle expense charges based on a cost accounting of the services provided, rather than a formula basis?
4. Are there any special features you are prepared to include, a part of the basic offering, or as options, that would make AP&P significantly more attractive than “street products”?

IV. CURRENT PROGRAM

The State Bar currently does not provide AP&P.

V. RFI RESPONSE PROCESS

- A. **DEADLINE: RESPONSES TO THIS RFI ARE DUE BY May 1, 2006.** At that time, the State Bar will review the responses.
- B. **ADDRESS:** Please send your response to:
Starr Babcock, Senior Executive for Member Services
Responses: RFI- AP&P
The State Bar of California
180 Howard Street
San Francisco, CA 94105
415-538-2070
Starr.Babcock@calbar.ca.gov

C. Disposition of Materials

Materials submitted in response to this RFI will be retained by the State Bar of California. Unless otherwise required by law, the State Bar will treat as confidential those confidential materials clearly marked as such.