



Request for Proposals (RFP)

Employee Benefits Insurance Broker and Consulting Services

Issue Date: January 19, 2022

RFP Due Date: February 14, 2022, 10:00 AM

Please return to:

ATTN: City Secretary
City of Bellmead
3015 Bellmead Drive
Bellmead, Texas 76705

Phone: 254-799-2436 x 6111

INSTRUCTIONS TO OFFERORS

1. The sealed envelope or package containing the completed proposal should be marked legibly on the outside with the description of the item being proposed as shown on the cover sheet of this Request for Proposals.
2. The Offeror shall sign and date the proposal where provided within the RFP. The person signing the proposal must have the authority to bind the firm in a contract. Proposals which are not signed and dated in this manner may be rejected.
3. The Offeror shall submit **one (1) unbound original and two (2) bound copies of the proposal documents unless stated otherwise within the specifications. Additionally, one digital copy shall be included on a USB drive.** All documents shall be received at the Office of the City Secretary, 3015 Bellmead Drive, Bellmead, Texas 76705, by the deadline shown on the cover sheet of this Request for Proposals. Proposals received after the deadline shall be considered void and unacceptable. The City of Bellmead is not responsible for lateness or non-delivery of mail, carrier, etc. The proposal will be date/time stamped in the City Secretary's Office when received, and this will be considered to be the official time of receipt.
4. Facsimile transmittals and electronic transmittals *will not* be acceptable.
5. The City of Bellmead, Texas, reserves the right to seek clarification and additional information with respect to any or all proposals, and to reject any or all proposals as it shall deem to be in the best interest of the City of Bellmead. The award of this contract shall be made to the responsible Offeror whose proposal is determined to be the highest evaluated offer resulting from negotiation, taking into consideration the relative importance of price and the other evaluation factors set forth in the RFP.
6. Proposals cannot be altered or amended after submission deadline. Any interlineation, alteration or erasure made before opening by the City must be initialed by the signer of the proposal, guaranteeing authenticity.
7. A proposal may not be withdrawn or canceled by the Offeror without the permission of the City for a period of ninety (90) days following the date designated for the receipt of proposals, and Offeror so agrees upon submittal of his proposal.
8. The City of Bellmead is exempt by law from payment of Texas Insurance Premium Tax as well as Texas Sales Tax and Federal Excise Tax.
9. All proposals meeting the intent of this Request for Proposals will be considered for award. Offerors taking exception to the specifications, or offering substitutions, shall state these exceptions by attachment as part of the proposal. The absence of such a list shall indicate that the Offeror has not taken exceptions and shall hold the Offeror responsible to perform in strict accordance with the specifications in this RFP. The City of Bellmead reserves the right to accept any, all or none of the exception(s)/substitution(s) deemed to be in the best interest of the City.
10. All communication with the City regarding this RFP is to be communicated through Ms.

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Karen Evans, Assistant City Manager at kevans@bellmead.com or by phone at 254-799-2436 x 6111. Sole issuing authority of addenda shall be vested in the Assistant City Manager.

Any interpretations, corrections or changes to this Request for Proposals and specifications will be made by addenda. Replies to all information pertinent requests will be sent in the form of an addendum to all firms known by the City to have received a copy of the RFP. Offerors shall acknowledge receipt of all addenda on the sealed envelope or package containing their proposals. No direct contact with or lobbying of City management, members of the RFP evaluation committee, or the Bellmead City Council will be permitted during the RFP process or after the RFP is released to the public. No gifts, lunches, or other gratuities will be accepted by the City during the RFP process. Vendors not complying with the above requirements will be disqualified from consideration.

11. Proposals must comply with all applicable federal, state, county and local laws concerning these types of services.
12. The apparent silence of these specifications as to any detail or to the apparent omission of a detailed description concerning any point shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of these specifications shall be made on the basis of this statement.
13. A prospective Offeror must affirmatively demonstrate Offeror's responsibility. A prospective Offeror must meet the following requirements:
 - a. have adequate financial resources, or the ability to obtain such resources as required;
 - b. be able to comply with the required or proposed delivery schedule;
 - c. have a satisfactory record of performance;
 - d. have a satisfactory record of integrity and ethics; and
 - e. be otherwise qualified and eligible to receive an award.

The City of Bellmead may request representation and other information sufficient to determine Offeror's ability to meet these minimum standards.

14. Section 176.006 of the Texas Local Government Code requires a vendor of the City of Bellmead to file a completed conflict of interest questionnaire (Form CIQ) if the vendor has a business relationship with the City and:
 - (a) has an employment or other business relationship with a City of Bellmead local government officer or a family member of the City of Bellmead local government officer that results in that person receiving taxable income, other than investment income, that is more than \$2,500 in the preceding twelve months;
 - (b) has given a City of Bellmead local government officer or an officer's family member, one or more gifts totaling more than \$100 in the preceding twelve months, excluding a political contribution as defined by Title 15 of the Election Code or food accepted as a guest; or
 - (c) has a family relationship with a City of Bellmead local government officer.

A vendor is required to file a completed questionnaire with the City Secretary's office not later than the seventh business day after the later of the following:

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- (a) the date the vendor begins discussions or negotiations to enter into a contract with the City of Bellmead or submits an application or response to a bid; or
- (b) the date the vendor becomes aware of any business relationship as outlined in the preceding paragraph.

“Local Government Officer” means:

- (a) a member of the governing body (i.e. mayor or council member);
- (b) a director, superintendent, administrator, or other person designated as an executive officer of the City of Bellmead; or
- (c) an agent of the City of Bellmead who exercises discretion in the planning, recommending, selecting, or contracting of a vendor.

State law requires that a vendor file an updated completed questionnaire with the City Secretary’s office not later than the seventh business day after the date on which the vendor becomes aware of an event that would make a statement in the questionnaire incomplete or inaccurate. Compliance with this law is the responsibility of each bidder/vendor.

<https://www.ethics.state.tx.us/forms/CIQ-New-2015.pdf>

15. In 2015, the Texas Legislature adopted House Bill 1295, which added section 2252.908 of the Government Code and applies to all contracts entered into on or after January 1, 2016. The law states that a governmental entity may not enter into certain contracts with a business entity unless the business entity submits a disclosure of interested parties to the governmental entity at the time the business entity submits the signed contract to the governmental entity. The law applies to all contracts/purchases of a governmental entity that require an action or vote by the governing body of the entity.

With regards to City of Bellmead purchases, a vendor that is awarded a contract or purchase that is greater than \$50,000 is required to electronically create a Form 1295 through the Texas Ethics Commission website:

https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm

and submit a signed copy of the form to the City’s Assistant City Manager (kevans@bellmead.com) for acknowledgment. A contract, including a City-issued purchase order, will not be enforceable or legally binding until the City receives and acknowledges receipt of the properly completed Form 1295 from the awarded vendor.

16. By submitting a proposal each Offeror waives all claims against the City of Bellmead, its officers, agents, employees, and contractors, and the City of Bellmead Employee Benefits Trust and the trustees thereof, to the extent such claims in any way arise out of or in connection with the administration, evaluation, or recommendation of any offer, the waiver of any requirements in connection therewith, the acceptance or rejection of any offer, and the award of the contract.
17. Government code 2270 (Texas HB 89 – effective 09/01/2017) – the Vendor entering a contract with the City verifies that it (1) does not boycott Israel; and (2) will not boycott Israel during the term of the contract and any subsequent renewals.

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18. Texas SB 252 (effective 09/01/2017) – provides that (1) the City may not enter into a governmental contract with a Vendor that is identified on a list prepared and maintained by the comptroller and that does business with Iran, Sudan, or a foreign terrorist organization; and (2) a company that the United States government affirmatively declares to be excluded from its federal sanctions regime relating to Sudan, its federal sanctions regime relating to Iran, or any federal sanctions regime relating to a foreign terrorist organization is not subject to contract prohibition under this subchapter.
19. All Proposals must be prepared and signed by the proposer in the form attached hereto. **THESE INSTRUCTIONS MUST BE INCLUDED IN THEIR ENTIRETY WITH EACH PAGE INITIALED BY THE PROPOSER.** All blank spaces in each Proposal Form together with appropriate schedules must be completed in full in ink or typewritten.

The opening of the proposals is scheduled to be held in the City Council Chambers located in City Hall, 3015 Bellmead Drive, Bellmead, Texas. Each Respondent is invited to attend.

The City of Bellmead is aware of the time and effort you expend in preparing and submitting proposals to the City. Please let us know of any submittal requirements causing you difficulty in responding to our Request for Proposals. We want to facilitate your participation so that all responsible vendors may compete for the City's business.

I. INTRODUCTION

A. Purpose of RFP

The City of Bellmead (hereinafter referred to as the “City”) is requesting proposals from qualified brokers and/or consultants to provide professional services related to our fully insured employee benefit package offering. This includes, but is not limited to, services relating to: health (including prescription plans), dental, vision, group life/AD&D, long and short term disability, EAP programs, and other benefits. Services to the City should include compliance, cost analysis and savings, strategic planning and any other services that may be suggested to benefit the City and the current benefit package offerings. The City is seeking a consultant and broker that is experienced in the benefits market and advising all levels of staff and management in municipalities.

B. Background

The City of Bellmead is a growing community of approximately 10,000 citizens in the Waco, McLennan County area along the Interstate Highway 35 corridor. Our mission is to attract and retain quality employees by developing, communicating, and administering a competitive compensation and benefit package. The City of Bellmead has eighty-seven (87) budgeted full-time employees who are eligible for all employee benefits.

II. Overview of Current Benefits

Benefits currently provided by the City include: employer paid employee medical, prescription, dental, vision and basic life/AD&D insurance, long term disability, mandatory TMRS retirement contributions, and supplemental Section 125 Cafeteria Plan (including accident, cancer, critical illness and permanent life). Various optional dependent coverages for medical, dental, life/AD&D and supplemental benefits are available.

A summary of the Employee Insurance Benefits programs for which the City is requesting assistance from the consultant are as follows:

<u>Benefit Type</u>	<u>Current Provider</u>	<u>Expiration Date</u>
Health Insurance	United Health Care	09/30/2022
Dental Insurance	United Health Care	09/30/2022
Voluntary Supplemental Insurance	Mutual of Omaha & AFLAC	09/30/2022
Basic Life	Mutual of Omaha	09/30/2022
Vision	Eyemed	09/30/2022
Supplementary Insurance	HealthJoy	09/30/2022

III. **Scope of Services**

The City is seeking to name a Broker of Record for the City's employee insurance benefits who can offer programs that contain or reduce costs with effective approaches and a proven history of success. The broker selected will be expected to perform a range of benefit program services in all aspects of the City's benefit program including research, implementation, maintenance, and communication. The City expects the broker to perform all of the following functions, **including, but not limited to:**

A. Analysis and Reporting

1. Analyze existing benefit package and develop a cost-saving strategy or plan that offers similar options of coverage.
2. Identify long-range goals with projections of potential savings.
3. Analyze plan utilization through plan data and statistical or financial reports and provide recommendations for improvement.
4. Perform an analysis on similar sized entities to ensure competitiveness relating to the City's benefit plan offerings and cost.
5. Identify and inform the City of any trends or changing patterns relating to employee benefits and provide appropriate recommendations.
6. Prepare, provide, and present various reports as requested, including cost analysis and other financial reports, forecasting, or trend and experience reports.
7. Provide monthly, quarterly, and annual claim reports for review.
8. Assist with data collection and informational requests for GASB 45 valuations and provide strategic recommendations to mitigate liability.
9. Provide assistance with COBRA Administration.
10. Provide assistance with preparation of yearly ACA reports and complete impact analysis with strategic recommendations relating to PPACA.
11. Maintain full and accurate records with respect to all matters and services provided on behalf of the City benefit plans and programs. Project documents including spreadsheets, assumptions and calculations should be provided upon completion of any projects relating to the City's benefit plans and programs.

B. Communication and Problem Solving

1. Regularly monitor and evaluate performance measures and guarantees of providers.
2. Act as a liaison between the City and insurance providers.
3. Provide day-to-day consultation and timely response on plan interpretation and problem resolution.
4. Provide timely communication and assistance to all staff and retirees with issues relating to any aspect of the City's employee benefit program including, but not limited to, billing, claims, vendor service issues, disputes, election or eligibility changes, general troubleshooting.
5. Assist Human Resources and other applicable staff in any appeal, arbitration or court processes between the City and the providers on unresolved issues if needed. Provide advice to enforce City, employee, retiree, or dependents rights.
6. Attend City staff meetings as needed or other benefit related meetings for employees and/or retirees for assistance in benefit program maintenance.

C. Compliance

1. Assist with ongoing plan administration and ensure programs comply with all applicable State and Federal laws, updating staff accordingly with on-site training as requested.
2. Conduct compliance audit of City's applicable policies and procedures relating to the employee benefit program.
3. Assist in creation of communication materials to educate employees on necessary changes and to conduct dependent verification audits.
4. Assist staff as necessary with annual audit to ensure compliance in reporting or posting/notice requirements for benefit plans.

D. Strategy and Renewal

1. Establish both long-term (3-5 years) and short-term (annually) strategies for the City's benefit program, including any multi-year plan rates, etc.
2. Bid the City's benefit program for employee and retiree options on an as needed basis and assist in the collection of proposals and any negotiations on various topics including, but not limited to, pricing, service modifications, renewals, contractual terms, premiums, performance measures, communication materials and quality assurance standards.
3. Review and prepare analysis of proposals and provide recommendations for cost savings, plan design, plan quality, premiums, modifications, and any other topics relevant to the benefit program.
4. Conduct thorough market research and provide annual estimates of renewal rates and cost trends to assist in budget preparation.
5. Provide communication materials and support for the annual enrollment period including information on any changes and production of an annual open enrollment booklet.
6. Assist in open enrollment coordination, implementation, and communication.

E. Other Services Requested

1. Assist in the development of an employee wellness program to improve health and reduce costs both long and short term.
2. Provide options for an EAP to review. If selected, assist in implementation and communication of the new program.
3. Create and implement a year-round online portal for services that include, but not limited to, annual and new hire enrollment, changes, billing, reports, statements, and post-employment changes reducing administrative demands on staff.
4. Recommend and provide enhancements to marketing and communication materials of any form including both paper and online notifications for benefit, health, or compliance related information.
5. Prepare benefit surveys or provide published survey information as requested.
6. Create and present information in City Council or Staff meetings as needed.
7. Assist in development of satisfaction surveys.
8. Assist in development of risk management and/or control programs or provide recommendations to any current City programs.
9. Manage any transitions between vendors as necessary.
10. Recommend any educational opportunities including seminars, webinars or other options that would be beneficial to the City.
11. Recommend other services not currently provided or reduction of current services.

IV. Calendar of Events

<u>Day/Time</u>	<u>Event</u>	<u>Location</u>
January 19, 2022	RFPs sent out to potential consultants	City Hall 3015 Bellmead Drive Bellmead, TX 76705
January 31, 2022	Deadline for Questions	kevans@bellmead.com
February 14, 2022, 10:00 AM	RFP Deadline	City Hall
February 15-25, 2022	Submitted proposal review with City staff	City Hall
March 8, 2022	City Council Award of Contract	City Hall - Council Chambers

V. Proposal Submission Instructions and Information

A. Accepted Submissions

The City desires a long-term relationship with the broker/consultant selected assuming all benefit program related services listed above meet expected requirements and pricing remains competitive during the term. The City will be accepting proposal submissions from brokers/consultants licensed in the State of Texas. Submissions must be delivered in person or by U.S. Postal Service, FedEx, UPS, etc. RFPs submitted via telephone, fax, email, etc. will not be accepted. The City is not responsible for missing, lost, or late RFPs. Any RFPs received after the set deadline will not be accepted. All submissions will receive a time stamp upon delivery to ensure accuracy of receipt.

B. Submission Formatting

The proposer shall include three (3) copies of their completed written or typed proposal enclosed in an envelope labeled with the relative contact information necessary for proper delivery. **The envelope should also be marked with the RFP number to correctly identify the document.** Additionally, one digital copy should be included on a USB drive.

C. Questions and Correspondence

Any questions, comments, inquiries, or correspondence must be submitted in writing to Karen Evans, Assistant City Manager at kevans@bellmead.com. Written documents can be in the form of mail or email and written response will be returned by the City promptly. Any documents, comments, or inquiries received after the time previously listed will not receive a response. Any changes to this RFP arising out of submitted questions or other correspondence shall be addressed with an issued addendum.

D. Withdrawal of Proposals

Submitted proposals may only be withdrawn prior to the expiration of the submission deadline. Request for withdrawals must be submitted in writing and signed by the proposal via mail or email to Karen Evans, Assistant City Manager.

E. Rights of the City

Until and unless any proposal is accepted by the City, this RFP is not in any way to be construed as an agreement, obligation or other contract between the City and any person or firm submitting a proposal, nor does it obligate the City to pay for any costs incurred in preparation and submission of proposals or in anticipation of a contract. Proposals submitted in response to this request become property of the City and are subject to provisions of the Texas Public Information Act once an award announcement has been made. The proposer should designate and label as “CONFIDENTIAL” any and all information in the RFP which the firm claims to be confidential, however, information may still be subject to the Public Information Act. The contract award will be made at the sole discretion of the City after careful evaluation of provided information determines who is the most qualified to complete the scope of services requested by the City.

The City reserves the right to the following:

1. Further investigate qualifications or proposers under consideration by requesting confirmation of or further information related to the provided information in the RFP to clarify responses.
2. Reject any or all proposals and issue subsequent requests for proposals.
3. Cancel RFP either partially or in entirety without explanation.
4. Approve or disapprove use of particular subcontractors or vendors.
5. Negotiate with any, all, or none of the proposers.
6. Solicit best and final offers from all or some proposers
7. Accept other than the lowest cost proposal, based on which provides the best value to the City.
8. Waive informalities and irregularities in proposals.

F. Legal

All vendors submitting RFP’s are expected to comply with federal, state and local laws and regulations when preparing the RFP’s and the services to be provided. Applicable laws include, but are not limited to; American with Disabilities Act (ADA), Affordable Care Act, Texas Local Government Code, Texas Insurance Code, and other Federal and State confidentiality laws. Additionally, by submitting a proposal, each proposer represents and warrants that its proposal is genuine and not a sham or collusive to secure or provide an improper advantage to themselves or another vendor.

VI. Minimum Qualifications for Proposers

- A. Proposer shall have at least ten (10) years of experience providing brokerage and consulting services in Texas. Proposers with municipal experience of similar size is preferred.
- B. The proposer’s staff assigned to the City must have at least five years of experience in benefits administration and client management. The staff must be available for high volumes of communication with the City, employees, retirees and approved vendors.
- C. The proposer and team assigned to the City must be knowledgeable of applicable laws, regulations and codes and be familiar with trends relating to benefit programs in Texas municipalities.
- D. Proposer must be properly licensed and insured to provide services listed in this RFP and in the State of Texas. The successful proposer must maintain insurance coverage

appropriate for the fulfillment of any agreement resulting from this RFP. Additionally, in the event its employees, agents, or subcontractors enter premises occupied by or under City control, the successful proposer shall maintain public liability and property damage insurance in reasonable limits covering all obligations to the City, and shall maintain Worker's Compensation coverage covering all employees performing on premises occupied or under City control. Additionally, the proposer shall maintain Professional Liability insurance for the duration of any agreement resulting from this RFP and up to at least three (3) years after completion of agreement. Copies of certificates of coverage shall be provided upon the City's request.

VII. Required Proposal Content

A. Offeror Cover Sheet

B. Proposal Letter including Proposed Scope of Work and Fees

1. Briefly state your understanding of the services being requested and an executive summary as to how you will provide these services.
2. Give the names of the persons authorized to make representations for your firm, their titles, addresses, telephone numbers, and email addresses.

C. Consultant Questionnaire

1. Proposers must complete the Consultant Questionnaire (Attachment "D") and provide with proposal submission.

D. Table of Contents

1. Include clear identification of material by section and by page number.

E. General Information

1. Proposers must complete the general information page provided. This is Attachment "A" and must be signed by the person duly authorized to bind the proposer and identify the proposed account team.

F. Profile of the Firm

1. Include the firm name, date established and address of the office that would be assigned to the City.
2. Include a brief description of the firm's history, including any changes in ownership either anticipated or occurring within last three (3) years.
3. Include details on the firm's size, growth, philosophy and culture, and specific experience with public sector entities (preferably municipalities).
4. Include a listing of any lawsuit or litigation and result of action resulting from: (a) any project undertaken by the proposer or its subcontractors or affiliates where litigation is still pending or has occurred within the last ten (10) years; or (b) any type of project where claims or settlements were paid by the proposer or its insurers within the last ten (10) years.

G. Qualifications of the Firm and Team

1. Include a brief description of the proposer's and any sub-consultant's qualifications and a summary of previous experience on similar or related projects.
2. Provide a list of personnel that would be handling our account including the account manager and a brief summary of each listed individual's education, qualifications, responsibility with our account and a description of any previous or current projects with similar responsibilities. Formatting is provided in attachment "B".

3. Include an organizational chart with a description of workflow and provide the total number of accounts or clients with a breakdown of how many of the total each individual is responsible for.

H. References

1. Provide a client list, preferably municipality or other public sector clients that are either active or became inactive within the last five (5) years. Client list shall include the entity name, date firm began providing services to the client, date firm ceased providing services (if applicable), description of pertinent insurance programs negotiated and/or provided, number of covered individuals (employees/retirees), total cost of the project, brief statement on adherence to schedule and budget for each project.
2. Provide account contacts for listed clients who may be contacted by the City. Format of references is provided in attachment "C" and must have all information requested provided.

I. Services

Provide the following:

1. Complete description of services to be provided, including both the services outlined in this request and any additional recommended services. Provide a description of any and all unique brokerage or consulting services the firm will offer the City, please specify if the services are provided by the firm's staff or by an affiliate of the firm.
2. A description of the group, medical, dental, vision, life, accidental death and dismemberment, short- and long-term disability, EAP premium volume handled by the firm and by the specific office to which the City's account would be assigned.
3. List of principal insurance markets utilized by the firm in the order of premium volume placed with each market. The listing should be categorized by line of coverage (all items listed above in 2).
4. Description of technical or professional support available at no extra cost through the firm, such as legal counsel, communications, technology support or others.
5. Sample work plan for insurance renewal and negotiations.
6. Description of proposal to maintain open and prompt communication with all those involved in the benefit program including; vendors, employees, retirees, City staff, and dependents as necessary for any issues, troubleshooting, questions, concerns, etc.
7. Recommendations on administration and retention of records related to services provided and any associated costs for storage of records.
8. Description of project timeline outlining the transitioning process. Please include a time breakdown for each step in the process (data collection, online system set up, etc.)

J. Cost and Pricing Information

Provider must include the following information:

1. Comprehensive, specific description indicating how the firm would price the City's account and any estimated annual costs of service. It shall be clearly identified if pricing is determined by annual fee, fee for service, commission or combination of the two. Any and all rates of commissions and fees in comparison to consultant rates that the firm would expect to receive from the existing programs for services requested herein, as well as recommended services must be included. The City reserves the right to review and or audit any it's account related records of the selected broker related to commission, fees, etc.

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2. At the request of the City, prior to the award of the contract, the proposer shall be required to submit two (2) years of the firm's most recently completed financial statement, including all footnotes, auditor's opinion, or other financial instrument that would establish the firm's ability to complete the obligations of the contract resulting from this RFP.

Proposals that do not reflect a reasonable relationship between costs and proposed services may be viewed as failing to comprehend the requirements of the scope of work and result in a rejected proposal.

K. Conflict of Interest

Proposers must disclose any affiliations or business relationships with any employee, officer, contractor, or official of the City to ensure there are no conflicts of interest.

VIII. Evaluation and Selection

A. Evaluation Criteria

Criteria	Points
Scope of Services: Reputation and ability to reach a wide array of insurance markets and provide innovative services; ability to handle employee claim issues, depth of and commitment to services offered, assessment of references, plan of action; project organization, evidence of ability to provide service in a prompt, thorough, innovative and professional manner.	30%
Cost Savings: Demonstrates ability to produce successful cost savings strategies.	25%
Qualification of the Firm: Technical and cost saving method experience both show success; experience with municipalities, work is completed on schedule and within budget; qualifications of staff and key personnel; client references; strength and stability of firm and vendors used by the firm.	20%
Cost and Price: Total cost is reasonable and competitive with other offers received; adequate support data provided; individual task budgets are reasonable; basis on which price is quoted.	15%
Project Requirements: Demonstrated understanding of project requirements and any problem areas; project approach; work plan; and quality assurance program.	10%
TOTAL	100%

B. Evaluation Procedure

1. City staff will review all submitted proposals throughout the week following the final submission deadline as provided in the “Calendar of Events” section. A list of finalists will be determined based on the criteria given above. The City may require each finalist to present a proposal of services, provide supplemental information and provide the City the opportunity to meet and assess the proposed account team. Finalist evaluation may be scheduled at the discretion of the City. An award of contract may be made without discussion with proposers after responses are received.
2. The City reserves the right to select the firm, in the City’s opinion, will provide the most responsive and responsible services and highest value, even if that bid is not the lowest submitted.

C. Award

1. Once the City has completed proposal analysis, negotiations may be conducted for the extent of services to be rendered and for the method of compensation. The City is not required to complete negotiations so the proposal submitted shall include the proposer’s most favorable terms and conditions.
2. Any award will be contingent upon completion of a satisfactory contractual arrangement between the selected firm and the City. Inability to agree on contract terms will result in selection of an alternate firm. Unsuccessful candidates will be notified once a contract selection has been finalized by the City and City Council.

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3. In performance of the terms of any agreement resulting from this RFP, contractor or vendor agrees that they will not engage in, nor permit, such subcontractors, where applicable, as they may employ, from engaging in discrimination in employment or persons because of race, color, religion, national origin, or ancestry, age, sex, familial status, sexual orientation, or disability of such persons.
4. No assignment by a selected broker of a resultant agreement, or any part thereof, or of funds to be received there from, will be recognized by the City unless such assignment has had prior written approval and Consent of the City. The City will be contracting for the services of the individuals in the firm making the proposal and the qualifications of those individuals a material inducement for the award of the contract.

IX. Certification Statement

The undersigned does hereby declare that they have read the specifications and with full knowledge for the requirements, do hereby agree to furnish the coverage in full accordance with the specifications and requirements, for the following plans:

Employee Benefits Insurance Broker and Consulting Services

I certify that _____ and its

Firm's Name

response complies with these specifications. Also, as an officer of this organization, or per the attached letter of authorization, am duly authorized to certify this information provided herein are accurate and true as of the date.

Signature

Print Name

Title

Date

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Attachment A
General Information Page

Legal Name of the Firm Telephone Number

Street Address City State Zip Code

Fax Number Tax ID Number

Type of Organization (Corporation, Sole Proprietorship/Partnership)

Website Address

Project Manager Name Project Manager Title

Is this the person that regular correspondence should be directed to?
 Yes No If no, please provide contact information for appropriate contact.

Name, Title Email Phone Number

List of Major Subcontractors Proposed, Responsibility, and Phone Number:

Signature of Person Completing Form Date

Print Name of Person Completing Form

Please provide documentation that you are a State of Texas actuary licensed consultant or broker

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Attachment B
Firm and Assigned Team Qualifications

Name and Title	Education, Experience and Qualifications	Description of Area of Responsibility with City Account and Similar Experience	# of other current accounts

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Attachment C
Client References

Please provide at least three current and two past municipal clients, preferably Texas municipalities.
Copy this form as necessary.

Client Entity Name

Client Contact Name	Client Contact Title
Client Contact Email	Client Contact Phone Number

Client Street Address	City	State	Zip Code
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Please provide a brief description of the work performed for this client below:

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Attachment D
Proposer Questionnaire

Requested Information		Responses (if more room is required, complete on an additional sheet titled as "Responses to Attachment D")	
1.	How long has your organization been in business?	1.	
2.	Where is your firm's headquarters?	2.	
3.	Does your firm have any conflict of interest relating to the City of Bellmead? If yes, please explain.	3.	
4.	Has your firm established any limitation on the number of clients you intend to accept?	4.	
5.	What is your firm's policy/standard for returning phone calls, e-mails, or other forms of communication?	5.	
6.	Provide examples of when you have provided services that have gone beyond the expectations in the contract.	6.	
7.	What is your firm's highest value when servicing their clients?	7.	
8.	How many of your clients have between 50 and 100 benefit eligible employees?	8.	
9.	Does your firm use any sub-consultants? If so, provide firm's name, contact name, relevant experience and authority of decision making for our account on your behalf?	9.	
10.	How does your firm track and communicate legislative and industry trend updates relative to the City?	10.	
11.	Describe how you monitor performance of providers.	11.	
12.	Do you provide assistance with wellness plan creation, implementation, and maintenance with incentives?	12.	
13.	How do you determine if changes need to be made to a plan for higher effectiveness?	13.	
14.	What is your experience in assisting clients with Medicare programs?	14.	
15.	What is your firm's experience with telemedicine? If you offer it as an option, please describe the system and vendors you have used in the past.	15.	