



CITY OF HASLET, TEXAS

REQUEST FOR PROPOSALS (RFP)

EMPLOYEE BENEFITS BROKER SERVICES
RFP 2020-20

PROPOSAL DUE DATE:
Wednesday, August 12, 2020 5:00 P.M. (CST)

ISSUED BY:

City of Haslet, Texas
Administration Services Department

**VENDOR ACKNOWLEDGEMENT FORM
EMPLOYEE BENEFITS BROKER SERVICES**

The undersigned hereby certifies that he/she understands the Request for Proposal, has read the document in its entirety and that the prices contained in this Proposal have been carefully reviewed and are submitted as correct. Vendor further certifies and agrees to furnish any or all products/services upon which prices are extended at the price offered, and upon conditions contained in the Request for Proposal.

The following information must be filled out in its entirety for the proposal to be considered:

Company Name: _____

Address of Principal Place of Business:

Phone

Fax

Address, Phone and Fax of Majority Owner Principal Place of Business:

Phone

Fax

Name of Authorized Representative:

Printed Name

Signature and Date

E-Mail Address of Representative: _____
PLEASE INCLUDE THIS COMPLETED PAGE AS THE FIRST PAGE OF YOUR SUBMITTAL.

Request for Proposals

General Information

A. Intent

This City of Haslet, Texas hereinafter referred to as the “City”, is soliciting proposals for Employee Benefits Broker Services. It is the City’s desire to contract with one company to satisfy a need for a full-service Benefits Broker to handle the employee insurance benefits package and administration.

B. Proposal Submission Process, Due Date, and Required Documents:

One (1) original of the response including all required forms and applicable supporting documentation are required. One (1) complete electronic copy of the response saved in PDF format to a USB/Flash Drive. One (1) complete copy emailed to address specified or if file too large, then email containing internet cloud accessible document file.

Proposals are due no later than Wednesday, August 12, 2020 at 5:00 p.m., Central Standard Time. The response must be bound and sealed when submitted. The response material must be addressed and emailed to:

Dianna Buchanan
City Secretary/Administrative Services Director
City of Haslet
101 Main Street
Haslet, TX 76052
dbuchanan@haslet.org

The subject line of the email must state:

RESPONSE TO RFP 2020-20 EMPLOYEE BENEFITS BROKER SERVICES

Responses received later than the above date and time will be rejected and sender will be notified of same. Timely proposals will be opened on the date specified in the RFP and will be kept secret during the process of negotiations. All proposals that have been submitted shall be open to public inspection after the contract is awarded, except for trade secrets and confidential information contained in the proposals marked “confidential” by the proper responding party.

C. Clarification of Requirements

All request for additional information or clarification concerning this Request for Proposals must be submitted, in writing no later than 5:00 P.M. on Friday July 8, 2016 and shall be emailed to Dianna Buchanan, City Secretary/Administrative Services Director, at dbuchanan@haslet.org.

It is the intent and purpose of the City that this RFP permits competitive proposals. It is the Offeror's responsibility to advise the City Secretary/Director of Administrative Services, Dianna Buchanan, City of Haslet, if any language, requirements, etc., or any combinations thereof, inadvertently restricts or limits the requirements stated in this RFP to a single source.

D. Addenda to the RFP

If it becomes necessary to revise any part of this RFP, an addendum will be distributed to qualified potential vendors in the same manner as the initial RFP was announced.

E. Contract Term

The initial contract shall be for a three (3) year period commencing upon approval of Haslet City Council but no later than September 1, 2020. The City shall have the option to extend the term of the contract for two (2) additional one-year periods. Thereafter, this agreement shall automatically renew for successive periods of one (1) year each under the terms and conditions stated herein, unless either party give prior notice of termination.

F. Cancellation

The successful Offeror will be awarded a contract on an exclusive basis. The City has the option to terminate the contract during the first six (6) months of the contract if the successful Offeror does not perform the contract to the City's satisfaction. Thereafter, either party may terminate the contract by giving the other party thirty (30) days prior written notice. The successful Offeror may not assign the contract to any other party without the prior written consent of the City. The City of Haslet is a Type A Municipality operated and funded on an October 1 to September 30 basis; accordingly, the City reserves the right to terminate, without liability to the City any contract (or renewal option) for which funding is not available.

G. Qualifications of Offeror

By submitting a proposal, the Offeror certifies that they are duly qualified, capable, and otherwise a bondable business entity that is not in receivership or contemplate same, nor has filed for bankruptcy. Vendors interested in submitting a proposal must have the following qualifications:

- A Texas licensed insurance broker and/or agent
- In good standing with the State of Texas
- Able to provide timely, on-site services

H. Scope of Services

The City of Haslet is seeking a broker/consultant to perform services related to the design, bidding process and overall administration of medical, dental, vision, life, disability, compliance and voluntary benefits. Specific responsibilities include, but are not limited:

1. Represent the City in all negotiations with providers on all issues including those related to premiums, benefit levels, plan design and special terms and conditions.
2. Prepare Request for Proposal for insurance services or other employee benefit programs, employee wellness program; analyze and make appropriate recommendations.
3. Advise the City of local and national trends and innovative ideas, and recommend new products, programs and services to ensure a competitive benefits plan.
4. Review and analyze claims experience data, claims service, efficiency and accuracy of claims administration to ensure that the City is receiving optimum service and benefits from all carriers and vendors.
5. Review on-going employee communications program, including a review of booklets, announcement materials and benefit statements.
6. Manage carrier/vendor relationships, review and advise on master contracts, review carrier service levels and compare to performance guarantees, resolve administrative issues, and conduct periodic meetings as necessary.
7. Assist in COBRA, HIPPA, DOLS, and ACA compliance and reporting to include Summary Plan Descriptions and other Plan Documents as required.
8. Act as a technical resource and provide periodic updates on legislative developments and emerging trends.

I. Proposal Instructions

ALL PROPOSALS SUBMITTED BY THE BROKER MUST BE PRESENTED IN THE FORMAT PROVIDED BELOW AND MUST CLEARLY SHOW BROKER'S RESPONSE IN THE APPROPRIATE DESIGNATED SECTION. FAILURE TO FOLLOW THIS DIRECTIVE WILL CAUSE YOUR PROPOSAL TO BE DEEMED UNRESPONSIVE AND IT WILL BE REJECTED FROM ANY FURTHER CONSIDERATION. Broker should submit one (1) original copy of the proposal. In the event multiple proposal are received from the Broker, Broker will be asked to select one (1) proposal for consideration and the other will be returned to the Broker.

All proposals must include the following requested information in the appropriate sections as defined below.

1. Section I Introduction – Company Information

- a. Provide an overview of your firm and its ownership/organizational structure, and number of employees.

- b. Identify the member of your staff that would be assigned to this contract and provide a summary of their qualifications, and their availability to travel to our offices.

2. Section II Company Expertise/Experience

- a. Describe the marketing approach and methodology for soliciting coverage quotations on behalf of the City.
- b. Describe how you would determine areas of improvement and cost saving solutions.
- c. Describe your firm's consulting approach for bidding and selecting the most appropriate health plan alternative.
- d. Describe the firm's overall philosophy for servicing an account and commitment to customer service and quality assurance. What makes your customer service unique?
- e. Identify a minimum of three (3) other accounts similar in scope for which you are presently serving as Broker which can serve as a reference for your service.
- f. Detail your ability to monitor regulatory and legislative development at both the state and federal level, obtain information on trends, new services, new concepts and how this will be communicated to our organization and employees.
- g. Describe your view of the role of a Broker in this type of relationship and what differentiates your firm from other brokerage-consulting firms.
- h. Describe all services your firm/agency will offer the City.
- i. What type of performance measure would your firm use to evaluate customer service and the City employee satisfaction?
- j. Describe your procedure for dealing with employee inquiries.
- k. Do you offer assistance with claims and/or coverage questions?
- l. Describe the action that would be taken, the support provided, and the personnel who would be involved in investigating and settling a disputed claim.
- m. Describe the steps you anticipate will be needed to ensure a smooth transition if you are selected as the new Agent of Record.

3. Cost

This section should contain a summary cost sheet reflecting all non-benefit premium fees for services offered. If services are included in the benefit premiums charged by the provider network, include your commission rate(s) with each provider network. This section should also contain any cost saving factors that should be considered.

4. Overview of Current Insurance Programs

The following is provided as Broker information only. This is a general overview of the City's current employee benefits program. This information is to be used in the preparation of your proposal only.

Type of Coverage	Carrier	Employees + dependents Enrolled
Medical PPO Employee	Blue Cross P621CHC	14
Medical PPO Emp +Sp	Blue Cross P621CHC	1
Medical HMO Emp+Sp	Blue Cross G660ADT	1
Medical HMO Emp+Fam	Blue Cross G660ADT	1
Medical HSA Employee	Blue Cross G656CHC	7
Medical HSA Emp+Chldrn	Blue Cross G656CHC	1
Dental Hi Employee+Sp	Mutual of Omaha	3
Dental Hi Employee+Fam	Mutual of Omaha	3
Dental Hi Employee	Mutual of Omaha	11
Dental Hi Employee+Dep	Mutual of Omaha	1
Dental Lo Employee+Fam	Mutual of Omaha	3
Dental Lo Employee	Mutual of Omaha	3
Vision	Eye Med	43
Life Insurance & AD&D	Unum	64
Short Term Disability	Unum	26
Long Term Disability	Unum	26
Long Term Care	Unum	26
Voluntary Life Insurance	Unum	7
Other Voluntary Products	Colonial	2
Other Voluntary Products	AFLAC	1

5. Evaluation Criteria - The proposals received will be evaluated based on the following criteria to determine each Broker's qualifications. The order does not indicate relative ranking.

- a. Demonstration of competence, technical expertise, experience in employee benefits, insurance placement and Human Resources.
- b. Demonstrated record of responsiveness and quality of customer service on this type of account.

- c. Both the Broker's capabilities and the experience of individual team member assigned to the City's account will be considered.
- d. Availability to travel as needed to City offices.
- e. Rates, fees or charges including the level of detail provided in the firm's fee information, as well as the willingness of the firm to offer flexible fee arrangements.
- f. Broker's awareness and ability to provide timely, accurate communication of emerging trends, opportunities, regulatory updates and liabilities to clients.
- g. Broker's ability to provide a broad spectrum of consulting services, including, but not limited to actuarial, claims, administration, and alternative funding arrangements.
- h. Responsiveness of the Broker's proposal to the RFP, including clarity and organization of response, clear presentation of Broker's experience and approach to ensuring the needs of the City are fully met.

6. Selection and Award Process

- a. Responses to this RFP will be reviewed by an evaluation committee including the Finance Director. A short list of firms will be identified and may be interviewed by the evaluation committee.
- b. Selection shall be based on the evaluation factors published in the RFP. After the evaluation committee makes its initial selection, it shall proceed to negotiate a contract at a fair and reasonable price.
- c. If the City is unable to negotiate a satisfactory contract with the most highly qualified person or firm, the City shall formally end negotiations with that person or firm and begin negotiations with the second most highly qualified person or firm.
- d. Negotiations shall be undertaken in this sequence until a contract is made. The evaluation committee may allow proposal revisions after submission in order to obtain the best final proposal. Following the interviews and negotiations, the evaluation committee will recommend a contract to the city council. The city council will make the final selection of the contractor based on the evaluation committee's recommendation and whether the qualified Offeror's proposal is determined to be the most advantageous to the City, considering the evaluation factors set forth in this RFP.

J. Right of the City to Request Further Documentation

The City reserves the right to request additional documentation that it deems appropriate and necessary for the review and award process during both the initial proposal review process and the negotiation/award/appointment phase.

K. Right of the City to Cancel Request for Proposals, Elect Not to Award, Reject Proposals, and Waive Informalities or Irregularities.

The City expressly reserves the right to cancel this RFP at any time, to elect not award any or all of the contracts cited in this RFP, to reject any or all proposals, to waive any informality or irregularity in any proposal received, and to be the sole judge of the merits of the respective proposals received.

L. Examination of Documents and Requirements

Each Offeror shall carefully examine all RFP documents and thoroughly familiarize itself with all requirements prior to submitting a proposal to ensure that the proposal meets the intent of the RFP. Before submitting a proposal, each Offeror shall be responsible for making all investigations and examination that are necessary to ascertain conditions and requirements affecting the requirements of this RFP. Failure to make such investigations and examinations shall not relieve the Offeror from obligation to comply, in every detail, with all provisions and requirements of the Request for Proposal.

M. Proposal Copies

OFFERORS MUST SUBMIT THE PROPOSAL BY EMAIL TO DBUCHANAN@HASLET.ORG AND MAIL ONE ORIGINAL OF THE SEALED PROPOSAL NO LATER THAN THE DUE DATE/TIME DEADLINE AT THE FOLLOWING ADDRESS:

Dianna Buchanan
City Secretary/Director of Administrative Services
dbuchanan@haslet.org
City of Haslet
101 Main Street
Haslet, TX 76052

The original must be clearly marked "ORIGINAL".

All proposals, responses, inquiries, or correspondence relating to or in reference to this RFP, and all electronic media, reports, charts, and other documentation submitted by Offerors shall become the property of the City of Haslet, Texas when received.

N. Proposal Preparation Costs

Issuance of the RFP does not commit the City of Haslet, Texas, in any way, to pay any costs incurred in the preparation and submission of a proposal. The issuance of the RFP does not obligate the City of Haslet, Texas to enter into a contract for any services or equipment. All costs related to the preparation and submission of a proposal shall be paid by the Offerors.

O. Trade Secrets, Confidential Information, and the Texas Public Information Act/

If you consider any portion of your proposal to be privileged or confidential by statute or judicial decision, including trade secrets and commercial or financial information, clearly identify those portions.

Proposals will be opened in a manner that avoids disclosure of the contents to competing Offerors and keeps the proposals secret during negotiations. All proposals are open for public inspection after the contract is awarded, but trade secrets and confidential information in the proposals are not open for inspection.

The City of Haslet, Texas will honor your notations of trade secrets and confidential information and decline to release such information, initially, but please note that the final determination of whether a particular portion of your proposal is in fact a trade secret or commercial or financial information that may be withheld from the public inspection will be made by the Texas Attorney General or a court of competent jurisdiction. In the event a public information request is received for a portion of your proposal that you have marked as being confidential information, you will be notified of such request and you will be required to justify your legal position in writing to the Texas Attorney General pursuant to Section 552.305 of the Government Code. In the event that it determined by opinion or order of the Texas Attorney General or a court of competent jurisdiction that such information is in fact not privileged and confidential under Section 552.110 of the Government Code and Section 252.049 of the Local Government Code, then such information will be available to the requester.

Marking your entire proposal CONFIDENTIAL/PROPRIETARY is not in conformance with the Texas Open Records Act.

P. Conflict of Interest

The Offeror shall not offer or accept gifts or anything of value nor enter into any business arrangement with any employee, official or agent of the City of Haslet, Texas.

By signing and submitting the Proposal, the Offeror certifies and represents to the City the Offeror has not offered, conferred or agreed to confer any pecuniary benefit or other thing of value for the receipt of special treatment, advantage, information, recipient's decision, opinion, recommendation, vote or any other exercise of discretion concerning this Request for Proposal.

Q. Anti-Lobbying Provision

During the period between proposal submission date and the contract award, Offerors, including their agents and representatives, shall not directly discuss or promote their proposal with any member of the Haslet City Council or City staff except in the course of City sponsored inquiries, briefings, interviews, or presentations, unless requested by the City.

This provision is not meant to preclude Offerors from discussing other matters with City Council Members or City staff. This policy is intended to create a level playing field for all potential Offerors, assure that the contract decisions are made in public, and to protect the

integrity of the RFP process. Violation of this provision may result in rejection of the Offeror's proposal.

R. Authorization to Bind Submitter of Proposal.

Proposals must show vendor name and address of Offeror. The original proposal must be annually signed by an officer of the company having the authority to bind the submitter to its provisions. Person signing proposal must show title or **AUTHORITY TO BIND THEIR FIRM IN A CONTRACT**. Failure to manually sign proposal will disqualify the proposal from being accepted by the City of Haslet, Texas.

ABOUT THIS DOCUMENT

This document is a Request for Proposal. It differs from an Invitation to Bid in that the City of Haslet, Texas is seeking a solution, not a bid/quotation meeting firm specification for the lowest price. As such the lowest price proposed will not guarantee an award recommendation. Sealed proposals will be evaluated based upon criteria formulated around the most important features of a product or service, of which quality, testing, references, availability or capability, may be overriding factors, and price may not be determinative in the issuance of a contract or award.

The proposal evaluation criteria should be viewed as standards that measure how well an Offeror's approach meets the desired requirements and needs of the City of Haslet, Texas. The criteria that will be used and considered in evaluation for award are set forth in this document. The City will thoroughly review all proposals received.

A purchase order/contract will be awarded to a qualified Offeror submitting the best proposal. The City reserves the right to select, and subsequently recommend for an award, the proposed service which best meets its required needs, quality levels, and budget constraints.

The final selection and award of a contract can only be authorized by the City Council of the City of Haslet, Texas.