

*Vacant*  
Mayor

*Rene Rodriguez*  
At Large/ Mayor Pro Tem

*Maria Reyes*  
District 1



*Alejandro Garcia*  
District 2

*Victor Perez*  
District 3

*Yvonne Colon-Villalobos*  
District 4

*Adriana Rodarte*  
City Manager

### ***NOTICE TO INTERESTED PARTIES***

Sealed Requests for Qualifications will be received in person or by mail at the Administration Office, *c/o Olivia Navarro, City Clerk, 124 S. Horizon Blvd., Socorro, Texas 79927* **by no later than 3:00p.m., Monday, July 31,2017. No RFQ's will be accepted after 3:00 P.M. and will be returned unopened.**

The bids will be **opened on Tuesday, August 1, 2017, at 3:30 p.m.** at the City Hall Administration Office located at 124 S. Horizon Blvd., Socorro, TX 79927, for a Representative of Records Insurance Services for the marketing and placement of the City of Socorro's Health/Life Insurance benefit coverage and for providing other insurance related broker services.

One (1) original and four (4) copies of the proposal are to be submitted in sealed envelopes and clearly marked on the lower right-hand side corner with the following: ***"RFQ-Broker of Record/Fee Based Consultant", Attn: Olivia Navarro, City Clerk."***

Any additional information required by interested proposer must be submitted in writing to the attention of Olivia Navarro/City Clerk's Office *by Monday, July 24, 2017 at 12:00 p.m. (Noon-local time).*

Award will be made based on a review of qualifications, scope of services and cost. City Council reserves the right to reject any all proposals and waive technicalities. Only proposals that conform to specifications will be considered. Faxed proposals will not be accepted. Successful proposer shall not perform services until both parties sign an agreement. Payment will not be made on services delivered without a Contract.

Vendors submitting a bid must meet or exceed all specifications herein.



***REQUEST FOR QUALIFICATIONS (RFQ's)***

***CITY OF SOCORRO, TEXAS***

***Representative of Record Insurance Services for City of Socorro's  
Health/Life Insurance Benefit Coverage***

**Signature Page**

To: City of Socorro

I or we agree to furnish the following described health/medical insurance bids or services for the process shown in accordance with specifications listed below or attached. By execution of this proposal, I hereby represent and warrant to City of Socorro, Texas that I have read and understood the Proposal Documents and the Contract Documents and this proposal is made in accordance with the Proposal Documents.

**Description-RFP-Broker of Record**  
**Vendor must meet or exceed specifications**  
**Please submit one (1) original and four (4) duplicate copies of your proposal.**

\_\_\_\_\_  
**Company**

\_\_\_\_\_  
**Address**

\_\_\_\_\_  
**Federal Tax ID No.**

\_\_\_\_\_  
**City, State, Zip Code**

\_\_\_\_\_  
**Representative Name & Title**

\_\_\_\_\_  
**Telephone & Fax Number**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**

**\*\*\*FIRST PAGE OF PROPOSAL\*\***

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**City of Socorro, Texas**

Request for Qualifications

For

Representative of Record Insurance Services for City of Socorro's Health/Life  
Insurance Benefit Coverage

**1.0- General Information:**

The City of Socorro, Texas (hereinafter referred to as "The City") hereby requests proposals from firms qualified to provide employee health benefits. Working in partnership with the selected bidder, we want to procure and maintain a health benefits program that will help us to attract and retain top quality employees. The City is particularly interested in benefits that help us maintain quality and contain cost without sacrificing soundness.

The information contained applies to the City of Socorro, Texas, 79927. These specifications are confidential and are to be used only in connection with preparing your proposal of insurance. All records, member files, and miscellaneous data necessary to administer the plans shall be the property of the City. In the event of termination, the broker will agree to transfer records to the City within 30 days of notice.

The City reserves the right to accept or reject all or any part of the proposal, waive minor technicalities, and award the proposal to best serve the interests of the City.

Proposals should be submitted on the basis of the specifications provided. Alternate proposals will also be considered, provided the alternatives are clearly explained. All deviations from the specifications must be clearly identified.

The information herein is believed to be accurate and up-to-date, but is not intended to be an express or implied warranty.

All proposals must be signed by persons who have the legal authority to bind the provider. The proposals must include a specimen contract and any endorsement, if applicable.

Each submission must include one original and eight copies of benefits, and one questionnaire answer page only. Should you wish to submit additional variation of your response, each variation must be submitted separately according to the submission requirements stated above.

Where applicable, all companies submitting proposals must be licensed by the State of Texas and be permitted to contract with the State or any of its subdivisions. Proposers who fall under the guidelines of the Interlocal Cooperation Act, Chapter 791, Title 7, Government Code, will be acceptable.

Proposals are anticipated to provide a 12 month rate guarantee and a three (3) year proposal with annual renewal option.

Public Section employers are not allowed, under current state law, to execute a document containing a Hold Harmless/Indemnification Clause causing the employer to be responsible for another parties' liability. Therefore, your documents should not contain any such clauses.

The City of Socorro reserves the right to accept or reject all or any part of the proposals, waive minor technicalities, and award the proposal to best serve its interest. The City of Socorro also reserves the right to waive or dispense with any of the formalities contained herein.

Failure to comply with the requirements or the procedures set forth herein, or to satisfy the coverage and exceptions to the specifications will, in and of themselves, result in disqualification.

All materials necessary to effectively communicate and administer the programs shall be prepared and printed by the proposer's own expense.

Enrollment meetings will be scheduled prior to the effective date of the contract. The proposer will be responsible for presenting the new plan and enrolling employees at the City of Socorro, Texas.

Please complete the appropriate enclosed proposal forms which include a Questionnaire, Rate Pages, all proposal forms submitted. ***FAILURE TO COMPLETE PROPOSAL FORMS WILL RESULT IN THE PROPOSAL BEING DISQUALIFIED.***

The City of Socorro, Texas accepts no financial responsibility for any costs incurred by any proper in the course of responding to these specifications.

***1.01- General Proposal Requirements:***

Each bidder shall furnish a complete name, mailing address, and telephone number.

Each proposal must designate the individual(s), along with respective telephone numbers, who will be responsible for answering technical and contractual question with respect to their proposal.

The City, in its sole discretion, expressly reserves the right to request and/or require any additional information from the bidder(s) that it deems relevant with respect to this RFQ.

Cost for developing proposals is entirely the responsibility of the vendor and shall not be chargeable to the City.

The Vendor shall totally indemnify the City against all claims, b his employees, agents, or representative for injury arising from any cause. The vendor shall totally indemnify the City as a result of claims relating to infringement of proprietary rights for all of the services and equipment being provided. The vendor shall not liable to the City for any failure or delay in the performance, which is due, in whole or in part, to any cause beyond the vendor's control.

Proposals should not contain promotional or display materials, except as they may directly answer, in whole or in part, questions contained in the RFQ. Such exhibits shall be clearly marked with the applicable reference number of the questions in the RFQ.

The contents of the proposal and any clarification or counter proposal there to submit by the successful vendor shall become part of the contractual obligation and incorporated by reference into the ensuring contract.

Products and services not specifically mentioned in this RFQ, but which are necessary to provide the functional capabilities described by the vendor shall be included in the proposal.

It is intended that this RFQ describe the requirement and response format in sufficient detail to secure comparable proposals.

A vendor may withdraw his proposal by submitting a written request for its withdrawal over the signature of an authorized individual as described above, to the City Manager any time prior to the submission deadline. The vendor may, thereafter, submit a new proposal prior to the deadline. The vendor may, thereafter, submit a new proposal prior the deadline. Modifications offered in any manner will not be considered if submitted after the deadline.

The successful vendor may be required to provide an affidavit that he has not conspired with other potential brokers in any matter to attempt to control competitive pricing.

Pursuant to Texas Local Government Code Section 262.030 of VTCA, proposals shall be opened so long as to avoid disclosure of the contents to competing offers. Details will not be released until all ensuring negotiations have been completed and contractual agreements have been executed. All information submitted on this RFQ will be public record.

The City is requesting sealed bids for the provision of a Representative of Record Insurance Services for marketing and placement of the City of Socorro's Health/Life Insurance benefit coverage and for providing other insurance related

broker services until 3:00 p.m.(Local Time) on Monday, July 31, 2017, at the City of Socorro Administration Building located at 124 S. Horizon Blvd., Socorro, Texas, 79927. All proposals become property of the City and will not be returned to the vendor.

If any person contemplating submitting a proposal for this contract is in doubt as to the true meaning of the specifications or proposals documents or any part thereof, he may submit to the City Manager on or before five days prior to the scheduled closing a request for clarification. All requests must be submitted in writing. All questions and responses to the requests will be answered in writing with copies furnished to all known offerers bidding on this RFQ.

The vendor certifies that he is a duly qualified, capable, and otherwise bondable business entity that he is not in Receivership or contemplates same, and has not filed for bankruptcy.

After bid opening and prior award, the City reserves the right to make a pre-award survey of any or all vendor's facilities and equipment to be used in the performance of work under this solicitation. Vendor agrees to allow all reasonable requests for inspection of such facilities within two (2) days of advance notice. Failure to allow such an inspection shall be cause for rejection of proposals and non-responsive. The City reserves the right to reject facilities or equipment as unacceptable for performance under this solicitation as a result of such pre-award survey. In addition, vendor's reputation relating to quality of performance may also be used for purposes of evaluating a vendor's suitability for award under this solicitation.

Submission of a bid in response to this Request for Qualifications will affirm that the vendor will not discriminate against any employee or applicant for employment because of race, religion, sex, sexual preference, color or national origin and that the firm will make efforts to ensure that employment is offered to applicants without regard to their race, religion, sexual preference, color, and national origin.

Technical questions concerning this proposal or request for site visit should be addressed to the following:

**Olivia Navarro/City Clerk**  
**City of Socorro, Texas**  
**124 S. Horizon Blvd.**  
**Socorro, Texas 79927**  
**Phone: (915)858-2915**  
[onavarro@ci.socorro.tx.us](mailto:onavarro@ci.socorro.tx.us)



**1.02- Legal Requirements:**

All parties submitting proposals are expected to comply with federal, state, and local laws, and mandates relative to the preparation of proposals and the services to be provided and all applicable federal laws and regulations. Specifically, the services to be provided are expected to be in compliance with the: American with Disabilities Act (ADA); Age Discrimination in Employment ACT (ADEA); Consolidated Omnibus Budget Reconciliation Act (COBRA); Family and Medical Leave Act (FMLA); health Portability and Accountability Act of 1996 (HIPAA) and all applicable federal and state requirements, including without limitation, ERISA, the Internal Revenue Code, and its corresponding regulation, Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA), insurance laws and regulation, and state anti-discrimination requirements. All proposals that are submitted will be presumed to be in compliance with all applicable laws.

**1.03- Selection Criteria:**

The City reserves the right to award the subjects in whole or in part, to those bidders who demonstrate professional competence in submitting proposals that satisfy cost, coverage, and servicing criteria. Servicing criteria will be evaluated in terms of such considerations as number of years in business; size of agency and staff; experience of staff; and professional servicing capability.

Proposals will be carefully evaluated in terms of cost, effectiveness, and compliance with specifications. Awards will be made to the bidder submitting the **best value** based on the following criteria.

***Criteria for awarding the bid are as follows:***

- Ability to meet the specifications in regard to the plan design
- Demonstration of the ability to provide the services required
- Effective administration, implementation, and maintenance of the plan
- A demonstrated commitment to the delivery of quality cost effective, health care
- Length of initial rate/premium guarantee
- Pricing is important in the context value. The award of the contract shall be made to the responsible provider whose proposal is determined to be the evaluated offer resulting from negotiations after all request for qualifications have been received. All factors outlined in the specifications will be taken into consideration in determining which proposal represents the best value.

**1.04- Award of Contract(s):**

The award of the contract shall be made to the responsible bidder whose proposal is determined to be the best possible value to the City, taking into consideration

the relative importance of price and other evaluation factors set forth in 1.03 above.

All proposals submitted in accordance with the requirements of the RFQ shall be considered offers to contract on the terms contained in the proposals and in the RFP and at the price offered by the successful bidder. When the City award a contract to the successful bidders, it will constitute an acceptance of that offer and a contract between the City and the successful bidder(s) embodying the terms of the RFQ and the proposal will become effective on the date of such award.

The selected broker will be responsible for on-site enrollment at the City site. The administrator or carrier will be responsible for providing enrollment materials prior to open enrollment, and for additional materials as needed throughout the year.

**1.05- Plan Administration:**

***A. The City of Socorro's Responsibility:***

- Provide for payroll deduction of employee contributions
- Manage additions/deletions from the coverage
- Assist in the logistics of the enrollment process

***B. Selected Broker's Responsibility:***

- Provide a brief history of your organization including an overview on the ownership and local structure of your company. Please include an organizational chart showing the contemplated service team.
- Providers must be duly licensed in the State of Texas and comply with all applicable State insurance laws and requirements and/or duly constituted applicable insurance regulatory authorities.
- Submit a list of Texas counties for whom you currently provide services. Provide at least three (3) references including name, title, address, and phone number of client.
- The service provider must carry errors and omissions coverage with limits of liability of at least \$1,000,000 dollars each occurrence and \$1,000,000 dollars aggregate. Evidence of such coverage is to be submitted as part of the proposal.

**1.06- Other Information:**

1. All proposals submitted in accordance with the requirements of the RFQ shall be considered offers to contract on the terms contained in the proposal and in the RFQ and at the price offered by the successful proposer. Proposer agrees that this offer shall be valid and effective for a minimum of ninety (90) days from the date that proposals are opened by the City. When the City awards a contract to the successful bidder, it will constitute an acceptance of that offer as subsequently amended

by negotiation and a contract between the City and the successful bidder.

2. The plan year begins October 1, 2017 and ends September 30, 2018.

**2.0- Questionnaire:**

**2.01- General Questions:**

1. State name, address, city, state, zip code, and telephone number of firm.
2. State type of company (corporation, partnership, etc.)
3. Provide background or history of firm including experience relating to the administration of employee benefit plans.
4. What types of organizations/entities do you cover?
5. Provide the names of three (3) organizations or entities your company provides with group health coverage in the public sector.
- 6.

**2.02- Customer Service:**

1. What services are offered through your plan that provide the City with current trends and information regarding health/life benefits?
2. How is your company structured in order to resolve issues, problems, and provide information to the City?
3. How will you be able to provide us with a better possibility for better quotes?
4. What is your commission structure?
5. How much standing will be assigned to the City of Socorro?
6. Do you provide training or educational seminars regarding topics, such as COBRA, HIPAA, and other subjects?

**3.0- Declaration of Compliance:**

Primary Business: \_\_\_\_\_

Type of Company:  
(Corp., partnership, etc.) \_\_\_\_\_

Year started in business: \_\_\_\_\_

Number of years experience as a Broker of Record for public entities in Texas \_\_\_\_\_

The undersigned affirms that they are duly authorized to execute this contract, that this company, corporation, firm, partnership, or individual has not prepared this proposal in collusion with any other proposer, and that the contents of this proposal as to prices, terms, or conditions of said proposal have not been communicated by the undersigned not by any employee or agent to any other person engaged in this type of business prior to the official opening of this proposal.

Having reviewed the specifications, we have complied with all requirements and conditions except as noted on the attachment labeled Deviations.

\_\_\_\_\_  
**Company Name:** **Authorized Signature:**

\_\_\_\_\_  
**Address:** **Signatory's Name & Title:**

\_\_\_\_\_  
**City, State, and Zip Code:** **Telephone Number:**

\_\_\_\_\_  
**Date:**