



CITY OF ROBSTOWN

REQUEST FOR QUALIFICATIONS
FOR
PROFESSIONAL INSURANCE BROKER
RFQ #: 061024

City of Robstown
101 East Main
Robstown, Texas 78380

REQUEST FOR QUALIFICATION
Employee Benefits Brokerage and Consulting Services
City of Robstown

I. INTRODUCTION

The City of Robstown is requesting qualifications from qualified benefits brokerage/consulting firms to perform the full range of services related to the acquisition, maintenance, and improvement of the City's employee benefits and insurance programs. The services will commence on June 20, 2024 to obtain benefits no later than September 1, with the option of the contract renewing for three (3) consecutive years, subject to an annual review.

II. DESCRIPTION OF THE CITY OF ROBSTOWN

The City of Robstown is a Home Rule City in Nueces County incorporated in 1907. It is governed by a City Council consisting of a Mayor and six Council Members. The City's estimated population is 10,143. There are currently approximately 145 employees, with 145 employees qualifying for benefits. The benefits the City provides are Health, Dental, Vision, and Life, which also includes Long Term and Short Term disability for all full-time employees.

III. SCOPE OF SERVICES

The City of Robstown seeks an employee benefits partner that can provide professional, highly-qualified benefits guidance and services. This includes, but is not limited to the following:

- Develop short and long-range employee benefit goals and strategies.
- Partner with the Human Resources Department in the administration of all group insurance plans, including responding to questions from and providing information to staff and providing other benefits-related advisory services throughout the plan year.
- Review and analyze claims experience, claim service, and claim administration to ensure maximum benefit to the City.
- Determine and recommend the most cost-efficient funding methods for benefit programs.
- Prepare bid specifications and solicit proposals, as needed, from insurance markets that specialize in group insurance plans.
- Evaluate bids and bidders, including administration, coverage, claim payment procedures, customer service, networks, reserve establishment policies and financial solvency.

- Provide the City with in-depth analysis of proposed alternatives and assist with the process of selecting the most favorable annual renewal options.
- Apprise the City of local and national benefit trends and provide benchmark survey data to help calibrate program offerings with employee and employer costs compared to similar organizations.
- Meet with and provide reports and presentations to various City representatives, including City Council if requested.
- Assist the City with the implementation and communication of new programs or changes to existing programs, including attending and presenting information at Open Enrollment meetings.
- Work closely with the benefits team to develop and execute the benefits communication strategy.
- Partner with the City to effectively manage vendors that provide insurance or related services to the City.
- Act as advisor on issues, such as discrimination testing, 5500 filing, Section 125, COBRA, HIPAA, Medicare, FMLA, etc. Provide overall guidance to the City on Health and Welfare regulatory compliance.
- Research and report any new developments in the employee benefits arena on an ongoing basis.
- Recommend innovative ideas and new products, programs, and services to ensure a competitive and cost-effective benefits program.
- Introduce proven programs and ideas to aggressively manage healthcare costs.
- Educate and advise on healthcare reform, and the key strategic decisions that the City should consider.

IV. TIME REQUIREMENTS

A. Qualification Calendar

Request for Qualification issued: May 20, 2024

Due Date for Qualification: June 10, 2024 at 3:00 p.m. CST

V. FIRM QUALIFICATION AND EXPERIENCE

- Briefly describe your firm's history and background.
- Provide details of your firm's financial status and stability.
- Discuss any impending changes in your organization that could impact the delivery of services.
- Provide proof that your company carries Commercial General Liability Errors and Omissions insurance and coverage.
- Describe the proposed team that would work with the City and provide information about the qualifications and expertise of each team member.

- How often does your team meet with your clients and for what purposes?
- Describe what makes your firm uniquely qualified to work on our account.
- What types of training programs does your firm provide to its employees?
- What size of clients does your firm generally support?
- Do you have a method or process in place to gauge client satisfaction?
- What is your service philosophy?
- If your firm is selected, how would you propose we transition our account?
- Describe your approach to supporting our programs throughout the plan year.
- Do you have a process in place for tracking communication between you and your client?
- How do you manage vendor relationships?
- Describe your process for negotiating renewals. Share examples of your success in negotiating renewals.
- Describe your underwriting and actuarial resources.
- Describe any special analysis that you would provide to help manage our programs.
- Describe your experience managing employee claims escalation.
- Describe your experience assisting clients with complicated administrative issues and fostering positive resolution.
- Describe services you offer to support employee surveys and/or focus groups.
- Describe services you provide to assist with benefits benchmarking.
- Describe how you support the ongoing professional development of your clients.
- Describe any additional services offered by your company that may be of interest to the City.
- Does your company provide and/or support corporate wellness initiatives?
- Describe any programs that you provide to your clients that foster employee wellness.
- How do you support your clients in ensuring their employee benefits programs remain compliant with all federal and state laws?
- How does your firm assist clients with HIPAA compliance?
- Describe how your firm maintains client records in a HIPAA secure environment.
- Do you have in-house legal advisors or outside counsel, who provide guidance to you and your clients?
- Describe methods you employ to disseminate information about current trends and legislation.
- Do you assist clients in the preparation of their Form 5500s and Summary Annual Reports? Is there a cost for these services?
- Describe how you would prefer to be compensated for your services.
- Has your firm been subject to any lawsuits or settlements specific to compensation disclosure or practices within the last five years?
- Does your firm have any reservations in making available documentation of the commissions received from insurers?

- What is your company’s philosophy on accepting contingency/override compensation from insurers relative to the placement of insurance programs?
- Describe our right to terminate a contract with you. Is there a minimum contract period?
- Based on the information provided and the services requested, what is your proposed annual fee? Please make certain to identify any services mentioned in your proposal that are not included in your proposed fee (services that would be an additional expense).
- Provide three references from current clients, preferably of similar size and/or need and complexity to the City of Robstown. For each reference, please include:
 - Number of employees
 - Number/type of plans
 - Length of servicing relationship
 - Contact name, title, and phone number

IMPORTANT – Qualifications must be submitted in a sealed envelope. Faxed qualifications will not be accepted.

Qualifications submitted in one (1) original and two (2) copies are due at the City of Robstown **no later than 3:00 P.M. CST on June 10, 2024**. The City reserves the right to reject any or all qualifications submitted. Any competitive sealed proposal received after **3:00 PM, local time, on June 10, 2024**, will be automatically rejected and returned to the proposer unopened. Firms submitting qualifications may be delivered or mailed to the following address:

Delivery Address
City of Robstown
101 East Main
Robstown, Texas 78380
 Attn: Jacinda Martinez

The City will not be responsible in the event that the U.S. Postal Service or any other carrier system fails to deliver the sealed proposal to the City by the given deadline above.

Until the final award by the City of Robstown City Council, the City reserve the right to reject any and/or all qualifications, to waive technicalities contained in the proposal and to accept any proposal deemed most advantageous to the City. City also reserves the right to reject all bids and to re-advertise, or otherwise proceed when in the best interest of the City.

Award of a contract is contingent upon the budgeting and appropriation of funds for continuation of the professional services contemplated by this Request for Qualification. Jacinda Martinez, City Secretary, is available to discuss any aspects of the RFQ. You may reach Jacinda Martinez by email at Jmartinez@cityofrobstown.com with any questions no later than June 03, 2024.

Proposer Warranties

- A. Proposer warrants that it is willing and able to comply with State and Federal laws.
- B. Proposer warrants that it is willing and able to obtain, Commercial General Liability and Errors and Omissions insurance coverage providing a prudent amount of coverage for the willful or negligent acts or omissions of any officers, employees, or agents thereof.
- C. Proposer warrants that it will not delegate or subcontract its responsibilities under an agreement without the prior written permission of the City of Robstown.
- D. Proposer warrants that it is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency.
- E. Proposer warrants that is has not within a three year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records or making false statements.
- F. Proposer warrants that all information provided by it in connection with this Statement of qualifications is true and accurate.
- G. The Proposer, by signing and executing this proposal, certifies and represents to the City that proposer has not offered, conferred or agreed to confer any financial benefit, as defined by (1.07 (a) (6) of the Texas Penal Code, or any other thing of value as consideration for the receipt of information or any special treatment of advantage relating to this proposal.

I understand that a false statement on this certification may be grounds for rejection of this proposal or termination of the award.

Signature of Official: _____

Name (printed): _____

Title: _____

Firm: _____

Date: _____