

**EXHIBIT A
REQUIREMENTS**

**HIDALGO COUNTY
REQUEST FOR PROPOSALS**

**“Consulting Services for Self-Funded Insured
Group Health”**

RFP NO: 2019-221-XX-XX-YSS

Overview:

The County of Hidalgo is seeking qualified participants to enter into a contract(s) for the following services:

Consulting Services for Self-Funded Insured Group Health: A Health Benefits Consultant that is licensed by the State of Texas, including licensed pursuant to Article 21.07-02 of the Insurance Code of 1951. Hidalgo County is requiring a copy of your Life and Health Insurance Counselor License to ensure compliance with said statute. The consultant is being engaged to assist the County in procuring group health benefits including Life, Accidental Death and Dismemberment for approximately 3800. The County’s current Group Health Benefits Plan with Life, Accidental Death and Dismemberment coverage expires on December 31, 2015.

The Hidalgo County Drainage District No. 1 Board of Director’s may, at their option, utilize the “Consulting Services for: Part I-Self-Funded Insured Group Health Benefits including Life, Accidental Death and Dismemberment Consultant(s) selected by Hidalgo County for Hidalgo County Drainage District No. 1. Should the Board of Directors of Hidalgo County Drainage District No. 1 decide the firm selected as the Consultant is the same as the one selected by Hidalgo County, the firm shall offer Hidalgo County Drainage District No. 1 the same terms and provisions as it offers Hidalgo County.

The Hidalgo County Appraisal District Board of Directors may, at their option, utilize the “Consulting Services for Self-Funded Insured Group Health Benefits including Life, Accidental Death and Dismemberment Consultant(s) selected by Hidalgo County for Hidalgo County Appraisal District Board of Directors. Should the Board of Directors of Hidalgo County Appraisal District decide the firm selected as the Consultant is the same as the one selected by Hidalgo County, the firm shall offer Hidalgo County Appraisal District the same terms and provisions as it offers Hidalgo County.

The consultants must prepare to devote sufficient staff and time to the County to monitor the current group health benefits provider and assure that replacement coverage is selected and in place by January 01, 2020. The Hidalgo County Purchasing Department will receive sealed envelopes containing request for proposals with qualifications for the provision of “**Consulting Services for Self-Funded Insured Group Health**” as specified herein.

The Hidalgo County Purchasing Department will receive sealed envelopes containing proposals for the provision of “**Consulting Services for Self-Funded Insured Group Health**” as specified herein. Sealed proposals will be accepted until **9:30 AM, Wednesday, Month, day, 2019**. **ANY RFP RECEIVED AFTER THAT DATE AND TIME WILL NOT BE ACCEPTED AND WILL BE RETURNED UNOPENED.**

**Deliver Submittal to:
RFP Number: 2019-221-XX-XX-YSS**

US Postal Mail Address:
Martha L. Salazar, CPPB, Purchasing Agent
Hidalgo County Purchasing Department
Administration Building
2812 S. Business Hwy 281
Edinburg, Texas 78539

Physical Address:
Martha L. Salazar, CPPB, Purchasing Agent
Hidalgo County Purchasing Department
Administration Building
2802 S. Business Hwy. 281
Edinburg, Texas 78539

The Submittal Envelope Must Show The RFP Number, Name And Opening Date.

The following outlines the Request for Proposals:

SECTION I - GENERAL TERMS AND CONDITIONS

ADDITIONAL INFORMATION: Hidalgo County is requesting that proposals be routed to Martha L. Salazar, CPPB, Purchasing Agent, with a **Physical location of** 2802 So. Business Hwy 281, **(Southeast Corner of Canton & Business Highway 281)** Hidalgo County Administration Building, Edinburg, Texas, 78539

DISCLOSURE OF CONFLICT OF INTEREST:

Effective January 1, 2006, Chapter 176 of the Texas Local Government Code requires that any vendor, person, consultant or contractor considering doing business with Hidalgo County (“the County”) to disclose in the Conflict of Interest Questionnaire (the “CIQ”) attached as **Exhibit D**, the vendor, person consultant or contractor’s affiliation or business relationship that might cause a conflict of interest with the County. By law, the CIQ must be filed with the Hidalgo County Clerk’s Office no later than the seventh business day after the date the person becomes aware of facts that require that statement to be filed. The disclosure requirement applies to a person or business who contract or seeks to contract with Hidalgo County for the sale or purchase of property, goods or service. Any purchase order or contract resulting from this process shall be considered null and void if the successful participant fails to comply with Texas Local Government Code Chapter 176. Vendors, consultants, contractors and others who desire to conduct business with Hidalgo County are encouraged to refer to Texas Local Government Code Chapter 176 for the details of this law. An offense under Texas Local Government Code Chapter 176 is a Class C Misdemeanor.

Please submit complete CIQ forms to the Hidalgo County Clerk’s Office locate at 100 No. Clossner, Edinburg, Texas 78539-Hidalgo County Courthouse **COMPLETION AND SUBMISSION OF FORM CIQ IS THE SOLE RESPONSIBILITY OF THE PROSPECTIVE PROPOSER.**

PROPOSER'S AFFIDAVIT:

Prior to contract award, respondents to this RFP must submit a signed Proposer's Affidavit (attached herein in **Exhibit E**) certifying that the submission is (1) not the result of Collusion as described in the Proposer's Affidavit, (2) that the Respondent does not have a Conflict of Interest as described in the Proposer's, affidavit or (3) that the Respondent has not and will not attempt to lobby directly or indirectly as described in the Proposer's Affidavit.

NON-DISCRIMINATION:

Submitters, during the performance of this contract, will not discriminate against any employee or applicant for employment because of race, religion, sex, national origin or disability except where religion, sex, national origin or disability is a bona fide occupational qualification reasonably necessary to the normal operation of the contractor.

NON-COLLUSION:

Submitters, by submitting a signed submission, certify that the accompanying submission is not the result of, or affected by, any unlawful act of collusion with any other person or company engaged in the same line of business or commerce, or any other fraudulent act punishable under Texas or United States law.

PROCESSING TIME FOR PAYMENT:

Submitters are advised that a minimum of thirty (30) days is required to process invoices for payment.

ELECTRONIC TRANSMISSION OF PROPOSALS:

Hidalgo County's Purchasing Department will not accept telegraphic or electronically transmitted submissions.

PROOF OF FINANCIAL AND BUSINESS CAPABILITY:

Submitters must, upon request, furnish satisfactory evidence of their ability to furnish products or services in accordance with the terms and conditions of these requirements. Hidalgo County will make the final determination as to the submitter's ability.

SUBMITTER DEFAULT:

Hidalgo County reserves the right, in case of submitter default, to procure the articles or services from other sources and hold the defaulting submitter responsible for any excess costs occasioned thereby.

RESTRICTIVE OR AMBIGUOUS REQUIREMENTS:

It is the responsibility of the submitter to review the Request for Proposal (RFP) packet and to notify the Purchasing Department if the requirements are formulated in a manner that would unnecessarily restrict competition. Any such protest or question regarding the requirements or proposers procedures must be received in the Purchasing Department not less than seventy-two hours prior to the time set for the opening. These criteria also apply to requirements that are ambiguous.

HAND DELIVERED PROPOSALS: Hidalgo County requires submitters, when hand delivering proposals, to make sure that it is stamped with date and time by the County Purchasing Staff.

SIGNING OF PROPOSALS:

In order to be considered all submittals **must** be signed. **Please sign the original in blue ink.**

WAIVING OF INFORMALITIES:

Hidalgo County reserves the right to waive minor informalities or technicalities when it is in the best interest of Hidalgo County.

SUBCONTRACTING:

The successful submitter may not subcontract the award without the written consent of the Commissioners' Court of Hidalgo County.

DAVIS BACON ACT: (if applicable)

All selected and awarded firms are required to include the Davis-Bacon Act when advertising and developing specifications.

DURATION OF CONTRACT:

Effective date to commence is January 01, 2020. The term of the contract is for an initial period of one (1) year with the County's option to renew three (3) additional one (1) year terms.

Hidalgo County reserves the right to continue this proposal for an additional sixty (6) day "Grace Period" at the end of the contract term due to unforeseen delay of award for the next contract term,

SECTION II - RFP REQUIREMENTS

REQUEST FOR PROPOSALS:

The required contents and limitations for the preparation of the RFP are described in this section. Failure to provide the requested information or adhere to any County limitations will result in disqualification of the submitted RFP. A total of **One (1) original, one (1) electronic copy** of the RFP response shall be submitted to the address on the cover letter.

CONTENTS:

The required contents for the RFP are presented below in the order they should be incorporated into the submitted document.

SELF-FUNDED INSURED GROUP HEALTH FIRM QUALIFICATIONS: This section should contain the qualifications of the organization and the office location(s) involved. Additionally, this section should include:

- a. A description of the firm's personnel and their most recent similar projects;
- b. A summary example of at least one similar project with a county government;

- c. A minimum of three (3) client references for whom the same type of work or services was performed (list must include name, address, telephone number, date and project description) should be included for reference purposes;
- d. A summary of the work plan, approach, tasks and outline of information that will be required from Hidalgo County;
- e. A typical schedule for the completion of this type of project; and
- f. Additionally, the names of the personnel proposed for this project who participated in the listed projects should be provided;
- g. Errors and Omissions Insurance (Min. \$1 million per occurrence);
- h. Pursuant to Article 21.07-2 of the Insurance Code of 1951, Hidalgo County is requiring a copy of your Life and Health Insurance Counselor License to ensure compliance with said stature along with all other State, Federal or Local requirements.
- i. Minimum of five (5) years experience with County Government.

This project is limited to five (5) pages.

- (A) The Consultant must not have any monetary or financial interest with a potential participant.
This project is limited to five (5) pages.

Pursuant to Article 21.07-2 “Life and Health Insurance Counselor License-Prohibition of dual compensation-Section 4a.

- (B) The Consultant will not be allowed to sell any products related to Hidalgo County Self-Insured Group Health Program.

PERSONNEL AND STAFFING: The firm should provide an organizational chart for the project and a summary paragraph of the project work to be performed by each proposed staff member. Biographic summaries that highlight the experience relevant to the specific project responsibilities should be provided for all proposed personnel. There is a one (1) page limitation for each biographic summary provided.

REQUIRED CERTIFICATIONS AND SUBMITTAL: This section will contain any licenses and certifications as required by the State of Texas and Hidalgo County. The Group Health Consultant firm(s) should add copies of their Professional Liability Insurance.

UNDERSTANDING OF THE PROJECT: This section should demonstrate the submitter's understanding of the project needs, the work required, and any local issues or concerns. This description should be concise, candid, and limited to 3 pages in length.

SCOPE OF SERVICES: Consultant Services for Group Health is on an “As Needed Basis” including, but not limited to the following for:

GROUP HEALTH CONSULTANT

- Monitoring of current health benefits provider
- Information and data collection.
- Preparation of the Request for a Group Health Benefits Third Party Administration, Stop Loss For Self-Funded Medical Plan, Group Term Life, Accidental, Death & Dismemberment and Employee Assistance Program Proposal (RFP).
- Solicitation of qualified insurers and vendors.
- Analysis of responses for recommendation.
- Selection and presentation of finalists; and
- Program implementation (effective 01-01-20).
- Program premium recommendation.

- Initiatives to reduce group healthcare cost such as wellness programs.
- Must Provide and Present Quarterly Reviews of the County's Health Insurance Program, Specific Coverage(s), Detailed Utilization Reports Loss Data And Risk Management Measures to Commissioners Court.

PROPOSERS ARE TO PROVIDE A FEE SCHEDULE WITH THIS SUBMITTAL: Proposer is to provide a fee proposal based on the scope of work.

SECTION III: SELECTION AND SCHEDULES:

SELECTION PROCEDURES: The RFP shall be submitted according to the program implementation date of January 01, 2016. The County of Hidalgo is not required to select the proposal with the lowest fees, but shall take into consideration other factors, including past experience, qualifications, evidence of good organization background, references, ability to provide requested services any other factors found necessary for quality services.

RFP Scoring and Ranking:

- (A) Hidalgo County Commissioner's Court and/or an Evaluation Committee (selected and/or designated by County Commissioner's Court) will review, score and evaluate the proposals received in response to this Hidalgo County Request for Proposals.
- (B) After the proposals have been reviewed, scored and evaluated, a grid will be presented to Commissioner's Court for the purposes of ranking.

Negotiation Process: Hidalgo County Commissioner's Court will authorize the Purchasing Department to proceed to negotiate the proposal section of the RFP with the number one ranked firm. The firm will submit a detailed Scope of Services, project schedule/portion and flat fee proposal for negotiation. The consulting services firm shall be compensated by the County on an agreed upon flat fee. No commission fees will be allowed. After negotiations, if a contract for the engagement cannot be successfully completed for Commissioners Court's approval, the Purchasing Department will recommend to Commissioners Court that negotiations be ceased and the process will proceed with the second ranked firm. This process will continue until negotiation efforts are successful. The County of Hidalgo reserves the right to reject any and all RFP's.

Any contract awarded to a successful proposer will be in effect until **(a)** the contract expires, **(b)** delivery and acceptance of products and/or performance of services ordered, or **(c)** terminated by County with thirty (30) day's written notice prior to cancellation.

EVALUATION SYSTEM: The evaluation consists of a 100-point scoring system. Categories are further detailed in the Selection Criteria (Exhibit B) section of this RFP.