

<p>Firm Overview</p>	<p>5 points</p>
<ul style="list-style-type: none"> ▪ Historical Background ▪ Number and Locations of Offices ▪ Legal form: LLC, sole proprietorship, partnership, etc... ▪ Length of time in existence ▪ Annual Agency Revenues ▪ Number of Staff Members ▪ Days and Hours of Operation ▪ Disclose any conditions: bankruptcy, any financial problems, pending litigation, expected office closures, impending merger 	
<p>Firm Experience</p>	<p>30 points</p>
<ul style="list-style-type: none"> ▪ List all municipalities and/or counties to which your firm has served as served as a medical health plan agent and the dates of service, and carrier. ▪ List all municipalities and/or counties to which your firm has served an agent for supplemental insurance services and the dates of service ▪ Identify at least 4 current clients Hidalgo County may contact as references, include name, job title and telephone number of the person to contact for each reference ▪ Identify all lost or terminated public accounts in the last three years, describe the services your firm provided and state the reason for the end of the working relationship. ▪ List of insurance carriers with whom you have ceased your working relationship within the last three years. State the reason, the duration of each and the primary products you offered through them. ▪ Hidalgo County does not pay commissions. Describe your firm's plans to be compensated (i.e. retainers, fees, overrides or commissions) and how these amounts are calculated, including a 	

Presentation by Finalists

<p>comparison to industry standard.</p> <ul style="list-style-type: none"> ▪ Disclose any existing or potential conflicts of interest between the scope of work required by Hidalgo County and your firm's other business activities ▪ Furnish certificates of insurance showing the types and amounts of insurance carried by your firm. 	
<p>Firm Qualifications</p>	<p>30 points</p>
<ul style="list-style-type: none"> ▪ Licensed to provide insurance services in Texas ▪ List names of all staff who would be assigned and readily available to service Hidalgo County and describe their roles in servicing this account. ▪ List details of this staff's specific insurance experience as it relates to Hidalgo ▪ Outline your ability to provide expertise and experience in the area of health benefit plan analysis. ▪ Detail your ability to provide advice on health care cost containment. ▪ Describe the scope of your services involved in resolving disputed claims, problems, etc. between the insured and the insurance carrier. ▪ Describe the scope of your services involved in open enrollment. ▪ Give examples of your work with other clients, specifically in the municipal markets. ▪ Describe the list of services you will be providing to Hidalgo County which will be included in your compensation. 	
<p>Customer References</p>	<p>10 points</p>
<ul style="list-style-type: none"> ▪ Customer 1: current ▪ Customer 2: current ▪ Customer 3: Past 	
<p>Presentations</p>	<p>25 points</p>
<p>Presentation by Agent</p>	