

**EXHIBIT "A"**  
**SPECIFICATIONS/REQUIREMENTS**

Hidalgo County  
Actuarial Consulting Services  
For  
Part I- GASB 74 and/or 75 OPEB Valuation Analysis;  
Part II- Health Benefits Reserve Analysis  
**RFP: 2020-400-11-04-ABV**

---

**OVERVIEW:**

Hidalgo County is requesting sealed proposals from interested and qualified firms for **Actuarial Consulting Services-Part I: GASB 75 OPEB Valuation Analysis** for Hidalgo County's Post-Employment Benefits Package (OPEB) for **Health Benefits** for "Retired Employees" And **Part II: Health Benefits Reserve Analysis** for and Funding Projection Study as specified herein. Sealed Proposals will be accepted until **9:30 A.M., Wednesday, November 04, 2020**. **ANY PROPOSALS RECEIVED AFTER THAT DATE AND TIME WILL NOT BE ACCEPTED AND WILL BE RETURNED UNOPENED.**

**SECTION I**  
**GENERAL TERMS AND CONDITIONS**

Deliver Submittal to:  
**RFP No: 2020-400-11-04-ABV**

**ADDITIONAL INFORMATION:**

Hidalgo County is requesting that sealed proposals must be routed to Martha L. Salazar, CPPB, Purchasing Agent, at:

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

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

**The Submittal Envelope Must Show the RFP Number, Name and Acceptance Date.**

**ALL WRITTEN QUESTIONS WILL BE ACCEPTED VIA E-MAIL TO: [alexandra.vela@co.hidalgo.tx.us](mailto:alexandra.vela@co.hidalgo.tx.us) by NO LATER THAN, Tuesday, October 27, 2020 by 5:00 P.M.** Responses will be sent to all applicants via e-mail by no later than, **Thursday, October 29, 2020. TELEPHONE INQUIRIES WILL NOT BE ACCEPTED.**

**PROPOSER'S AFFIDAVIT:**

Prior 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 Proposer's Affidavit or 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.

**ELECTRONIC TRANSMISSION OF BIDS:**

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 bidding procedures must be received in the Purchasing Department not less than seventy-two (72) hours prior to the time set for the opening. These criteria also apply to requirements that are ambiguous.

**PROPOSAL DELIVERY:**

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

**SIGNING OF PROPOSAL:**

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.

**TERM OF CONTRACT:**

The contract will commence on January 1, 2021 for a period of four (4) years with the county's option to extend/ renew for an additional two (2) year term, at the same rates, terms and conditions. Hidalgo County reserves the right to continue this proposal for an additional sixty (60) day Grace Period at the end of the contract under the same rates, terms and conditions.

All costs and expenses associated with the preparation and submission for (bid, proposal and/or quotes) shall be the responsibility of the participant and no reimbursement for such charges or expenses shall be passed on onto Hidalgo County.

**DAVIS BACON ACT:**

All selected and awarded firms are required to include the Davis-Bacon Act when advertising and developing specifications. **(If applicable)**

**PARTICIPANTS ARE TO PROVIDE A FEE SCHEDULE WITH THIS SUBMITTAL:**

The fee will be negotiated after the ranking by Commissioners' Court of the most qualified firm. Hidalgo County is hereby requesting the proposal fees on a multi-year per section basis (including renewal option at the County's sole discretion.

**SECTION II**

# RFP's 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.

## **RFP SUBMISSION:**

A total of one (1) original, seven (7) copies and one (1) USB of response shall be submitted.

## **CONTENTS:**

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

## **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.

## **FIRM QUALIFICATIONS:**

The County of Hidalgo is seeking to contract with a competent firm(s), registered and licensed if applicable for the services being requested in the RFP and/or do business in the State of Texas, that has experience in, but not limited to, as stated and reflected in the ***“Scope of Services and Requirements”***.

## **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.

Additionally, this section should include a description of the firm's project personnel and their most recent similar projects. For each project, a client contract name and phone number should be included for reference purposes. Additionally, the names of the personnel proposed for this project who participated in the listed projects should be provided. This project list is limited to 5 pages.

## **REQUIRED CERTIFICATIONS AND SUBMITTAL:**

This section will contain any licenses and certifications as required by HIDALGO COUNTY, the STATE OF TEXAS, etc. **The Proposer(s) should add copies of their Professional Liability Insurance in the response.**

## **PROJECT OVERVIEW:**

The County of Hidalgo is seeking this request for proposal from interested and qualified firms to provide Consulting Services for **Part I: GASB 74 and/or 75 OPEB Valuation Analysis** for Hidalgo County's Other Post-Employment Benefits Package (OPEB) for **Health Benefits** for "Retired Employees". There are approximately 3,900 active employees eligible for health benefit at retirement. Of the approximately **1,100** retired employees; only **41** have elected to continue health coverage based on blended premium rates. As well as consulting services for **Part II: Health Benefits Reserve Analysis**.

Any information required from the County for these actuarial services will be provided on **“An as Needed Basis”**. The qualified firm(s) is one that can deliver the services requested in an efficient and effective manner while ensuring the highest standards of performance, integrity, customer service and fiscal accountability. The County of Hidalgo wishes to contract with a firm(s) that understands the importance of the tasks, the impact, and the necessary deadline for such implementation as required by the "Government Accounting Standards Board". The successful firm(s) will demonstrate the ability to consistently provide these services to the County of Hidalgo and will be evaluated, in part, by the degree to which the firm(s) shows how it will achieve these

benefits.

The County has four participating entities. These are Drainage District No. 1, Appraisal District, Community Service Agency and Head Start. For the OPEB analysis, the actuarial report must display totals for Hidalgo County and Drainage separately. The Hidalgo County portion shall consist of the total for the County, the Appraisal District, the Community Service Agency and Head Start. A worksheet detailing each of these three compiled entities must be provided along with the actuarial report. This worksheet must mimic all tables and schedules presented in the actuarial report for each entity. For the Reserves analysis, the actuarial report must display the best estimate reserve for each of the four entities mentioned above

**SCOPE OF SERVICES:**

Hidalgo County is requesting proposals from experienced firm(s) to provide ongoing Consulting Services for the Actuarial Studies/Services regarding for **Part I: GASB 74 and/or 75 OPEB Valuation Analysis** and **Part II: Health Benefits Reserve Analysis. (Refer to Exhibit "A-1"- ADDITIONAL SPECIFICATIONS /REQUIREMENTS)**

## Section III

### **SELECTION AND SCHEDULES**

#### **SELECTION PROCEDURES/EVALUATION SYSTEM:**

The evaluation consists of a 100-point scoring system. However, after the 100-point evaluation, Hidalgo County Commissioner's Court may elect to narrow the participating firms and request a presentation from a representative from firms.

An Evaluation Committee selected/designated by Hidalgo County Commissioner's Court, Elected Official and/or User Department will review, score and evaluate the Request for Proposals (RFP's) received. After the RFP's have been reviewed, scored and evaluated, a grid will be presented to Commissioner's Court for the purposes of ranking for recommendation. Thereafter the Hidalgo County Commissioner's Court will rank and/or award the proposal.

Categories are further detailed in the Selection Criteria (Exhibit B) section of this RFP.

#### **RATING AND EVALUATION PROPOSALS**

Proposals will be evaluated and rated for merit, innovation and completeness, in response to each of the elements outlined in the Scope of Services including but not be limited to, the items listed below:

1.	Firm's Qualifications and Staffing of Project Team	10 Points
2.	Understanding Of Project/Similar Projects	40 Points
3.	Experience Of Project Team/Ability To Commit Resources	40 Points
4.	Cost Fees	<u>10 points</u>
	Total	100 points

#### **NEGOTIATION PROCESS:**

The number one ranked firm will be contacted to submit a letter of engagement/contract for negotiations. If negotiations prove unsuccessful, Commissioner's Court will terminate negotiations with the firm and will contact the next highest ranked firm to open negotiations. The County of Hidalgo reserves the right to reject any and all RFPs.

#### **TERMINATION OF SERVICES:**

Any contract awarded to a qualified firm will be in effect until (a) the contract expires or (b) performance of all services are completed, or (c) terminated by County with or without cause, with ninety (90) days written notice prior to cancellation.