





# NOTICE

March 26, 2025  
Ortegon Insurance Agency, LLC  
505 S. Texas Blvd.  
Weslaco, Texas 78596

Delivered via email: [yvonne@ortegonagency.com](mailto:yvonne@ortegonagency.com)  
Term: May 14, 2025 – May 13, 2026

**Re: Extension 1 of 3 for Contract C-23-0342-05-14:  
“Consulting Services for Self-Funded Health Plan”**

Dear Ms. Ortegon,

This letter is to notify you that Hidalgo County has chosen the option to exercise the first, one (1) year extension under the same rates, terms, and conditions for the above referenced project. To proceed, please return the following to Hidalgo County Purchasing Department via email to [ived.sepulveda@co.hidalgo.tx.us](mailto:ived.sepulveda@co.hidalgo.tx.us) no later than **3PM on Wednesday, April 2, 2025:**


1. Certificate of Interest Parties – Form 1295 [Link to File Form \(state.tx.us\)](http://state.tx.us)
  - a. On box 3, please reference – **C-23-0342-05-14**
2. Updated Certificate of Insurance – ensure Hidalgo County is listed as a Certificate Holder
3. Signed Acknowledgment of Receipt of this Notice from an authorized representative

This item will be placed on the next available Commissioners’ Court meeting for approval. Failure to submit all items requested in a timely manner, may result in delay of award.

Yvonne Ortegon		04/01/2025
Authorized Representative Name	Signature	Date

Hidalgo County Purchasing Department appreciates your business. If any further assistance is required, please do not hesitate to call Ived Sepulveda, Contract Specialist I, at (956) 318-2626, extension 4861

Sincerely,

  
[Ignacio Amezcua \(Mar 25, 2025 16:02 CDT\)](#)  
Ignacio Amezcua, MBA, CTCM, CTCD  
Hidalgo County Purchasing Director

- 1. AI-99030 Requesting approval to process the following payment application as submitted by NM Contracting, LLC for construction services in connection with the El Paraiso Health Clinic:

PO #	Application #	Date	Amount
874037	14	3/27/25	\$17,172.48

- 2. AI-98981 Requesting approval to pay the following invoice as submitted by Brownstone Consultants for construction project management services in connection with the Hidalgo County El Paraiso Health Clinic Project.

Work Authorization #	PO #	Invoice #	Invoice Date	Amount
1	853570	4258248	04/01/2025	\$9,588.39

- 3. AI-98998 Requesting approval to process the following invoices from ERO Architects for professional services in connection with the Bio-Safety Laboratory Project:

PO #	Invoice #	Invoice Date	Amount
823453	2025-008	01/24/2025	\$3,841.38
823453	AS2025-022	02/06/2025	\$16,800.00

- 4. AI-98978 Requesting approval to enter into a one (1) year software license agreement for two (2) licenses with CDW-G for GOV MS MPSA Power Software License in the total amount of \$223.72 annually.

- 5. AI-99046 Requesting approval to pay the following invoice as submitted by ERO Architects for architectural services in connection with the Hidalgo County El Paraiso Project.

PO #	Invoice #	Invoice Date	Amount
853720	2025-055	04/02/2025	\$7,183.12

- 6. AI-99062 Requesting acceptance and approval of the Certificate of Construction Completion from SKO Elite Repair, LLC for the "Administration Conference Room Improvements" project, along with final payment of \$72,740.36 with authority for the County Judge and Hidalgo County Facilities Management Director to sign all required documentation.

**L. HIDTA - Task Force:**

- 1. AI-98806 Requesting authority to enter into a three (3) year subscription agreement for CLEAR Proflex with sole source **APPROVED** - West Publishing Corporation, in the monthly amount of \$19,970.

**M. Human Resources:**

*1*  
*Fuentes*  
*abstain*

- 1. AI-98989 Requesting authority to exercise the first, one (1) year contract extension with Ortegon Insurance Agency, LLC for "Consulting Services for Self-Funded Health Plan" (C-23-0342-05-14) under the same rates, terms, and conditions.

# CERTIFICATE OF INTERESTED PARTIES

FORM **1295**

1 of 1

Complete Nos. 1 - 4 and 6 if there are interested parties.  
Complete Nos. 1, 2, 3, 5, and 6 if there are no interested parties.

**OFFICE USE ONLY  
CERTIFICATION OF FILING**

Certificate Number:  
2025-1289744

Date Filed:  
04/01/2025

Date Acknowledged:

**1 Name of business entity filing form, and the city, state and country of the business entity's place of business.**  
Ortegon Insurance Agency, LLC  
Weslaco, TX United States

**2 Name of governmental entity or state agency that is a party to the contract for which the form is being filed.**  
Hidalgo County

**3 Provide the identification number used by the governmental entity or state agency to track or identify the contract, and provide a description of the services, goods, or other property to be provided under the contract.**  
C-23-0342-05-14  
Extension 1 of 3 - Consulting Services for Self-Funded Health Plan

4	Name of Interested Party	City, State, Country (place of business)	Nature of interest (check applicable)	
			Controlling	Intermediary

**5 Check only if there is NO Interested Party.**

**6 UNSWORN DECLARATION**

My name is Yvonne Ortegon, and my date of birth is 01/16/1974.

My address is 505 S. Texas Blvd., Weslaco, TX, 78596, USA.  
(street) (city) (state) (zip code) (country)

I declare under penalty of perjury that the foregoing is true and correct.

Executed in Hidalgo County, State of Texas, on the 1st day of April, 2025.  
(month) (year)

*Yvonne Ortegon*  
\_\_\_\_\_  
Signature of authorized agent of contracting business entity  
(Declarant)



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

2/8/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> <b>5G INSURANCE AGENCY</b> <b>3102 E Bus Hwy 83, Ste A</b> <b>Weslaco, TX 78596</b>	<b>CONTACT NAME:</b> <b>ANDREW GONZALEZ</b> <b>PHONE (A/C No. Ext):</b> <b>(956)969-1552</b>	<b>FAX (A/C, No):</b> <b>(956)973-0814</b>	
	<b>E-MAIL ADDRESS:</b> <b>andrew@5ginsagency.com</b>		
<b>INSURED</b>  <b>ORTEGON INSURANCE AGENCY</b> <b>505 S TEXAS BLVD</b> <b>WESLACO, TX 78596</b> <b>9563736692</b>	<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
	<b>INSURER A : PROGRESSIVE COMMERCIAL</b>		<b>29203</b>
	<b>INSURER B : USLI</b>		<b>25895</b>
	<b>INSURER C : TEXAS MUTUAL</b>		<b>22945</b>
	<b>INSURER D :</b>		
	<b>INSURER E :</b>		
<b>TX 78596</b>		<b>INSURER F :</b>	

**COVERAGES****CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
<b>B</b>	<b>COMMERCIAL GENERAL LIABILITY</b>			<b>BP1607843</b>	<b>2/3/2025</b>	<b>2/3/2026</b>	EACH OCCURRENCE \$ <b>1,000,000</b>	
	<input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR	<b>X</b>	<b>X</b>				DAMAGE TO RENTED PREMISES (Ea occurrence) \$ <b>100,000</b>	
							MED EXP (Any one person) \$ <b>5,000</b>	
							PERSONAL & ADV INJURY \$ <b>1,000,000</b>	
GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	GENERAL AGGREGATE \$ <b>2,000,000</b>							
							PRODUCTS - COMP/OP AGG \$ <b>2,000,000</b>	
<b>A</b>	<b>AUTOMOBILE LIABILITY</b>			<b>02065921</b>	<b>5/5/2025</b>	<b>5/5/2026</b>	COMBINED SINGLE LIMIT (Ea accident) \$ <b>1,000,000</b>	
	<input type="checkbox"/> ANY AUTO	<b>X</b>	<b>X</b>				BODILY INJURY (Per person) \$ <b>1,000,000</b>	
	<input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS						BODILY INJURY (Per accident) \$	
	<input type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident) \$ <b>100,000</b>	
	<b>UMBRELLA LIAB</b>						EACH OCCURRENCE \$	
	<b>EXCESS LIAB</b>						AGGREGATE \$	
	DED RETENTION \$						\$	
<b>C</b>	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b>			<b>0002056240</b>	<b>12/22/2025</b>	<b>12/22/2026</b>	PER STATUTE OTH-ER	
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	<b>Y/N</b>	<b>N/A</b>				<b>X</b>	E.L. EACH ACCIDENT \$ <b>1,000,000</b>
	If yes, describe under DESCRIPTION OF OPERATIONS below							E.L. DISEASE - EA EMPLOYEE \$ <b>1,000,000</b>
								E.L. DISEASE - POLICY LIMIT \$ <b>1,000,000</b>

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

**CERTIFICATE HOLDER****CANCELLATION**

Hidalgo County  
 2802 S. Bus. Hwy 281  
 Edingurg, TX 78539

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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THE STATE OF TEXAS §  
§  
COUNTY OF HIDALGO §

**CONTRACT FOR SERVICE**  
**C-23-0342-05-14**

THIS CONTRACT is made and entered into this 14th day of May 2024, by and between the **County of Hidalgo, Texas** by and through the **Hidalgo County Commissioners Court** (the "County"), and **Ortegon Insurance Agency, LLC** ("Company").

**WHEREAS**, County requested responses to notices for Request for Proposals (RFP) for: **“Consulting Services for Self-Funded Health Plan”** for the County (the **“Services”**). A copy of the procurement packet, including applicable specifications, is attached hereto as **Exhibit “A”** (the **“Procurement Packet”**), and is incorporated herein for all purposes;

**WHEREAS**, Company submitted a response to provide services in accordance with the specifications as proposed. A copy of the Company’s response to the Procurement Packet is attached hereto as **Exhibit “B”** (the **“Response”**), and is incorporated herein for all purposes;

**WHEREAS**, County has determined that Company has submitted the lowest and best bid to meet County's requirements for the Service, as herein described.

**WHEREAS**, Company represents that it is qualified and desires to perform such services; and

**WHEREAS**, in recognition of and in consideration of Company's agreement to perform the Services in accordance with the Procurement Packet, the Commissioners Court of County awards this contract to Company.

**NOW, THEREFORE**, for and in consideration of the mutual covenants and conditions hereinafter set forth, and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties hereto agree as follows:

1. County and Company hereby agree that this Contract is entered into in order to provide the Services to County. This Contract does not extend to any third parties any duties or benefits conferred in any manner hereunder or otherwise.
2. During the term of this Contract, Company shall be obligated and hereby promises and agrees to render and provide the Services in accordance with specifications and terms contained in **Exhibit “A”** Procurement Packet and **Exhibit “B”** Company’s Response. Services shall be performed within Hidalgo County. The Company will not begin to work or incur costs until authorized in writing by the County with the release of an authorized Purchase Order or other appropriate written authorization by the County or its designated agent. Company agrees in

performing the Services that it will use proper professional standards, comply with any and all appropriate laws and regulations in providing the Services, and devote such time as is necessary to safely and efficiently provide the Services. County reserves the right to evaluate any services provided by the Company and to reject the same if not in compliance with the specifications as provided in **Exhibit “A” and “B”**. If the County finds it necessary to require changes in the work provided because of errors made by the Company, the County shall require the Company to correct the work at no cost to the County and without amendment to the Agreement. Further, Hidalgo County reserves the right to request these services from other sources other than the successful vendor and shall not be in violation of any terms or conditions of said contract.

3. **Term.** This Contract shall be for a period of **one (1) year**, commencing on **May 14, 2024**, and expiring on **May 13, 2025**, unless sooner terminated. The term of this agreement may be extended at the County’s sole discretion for three (3) additional one (1) year term(s) under the same rates, terms and conditions. Hidalgo County also reserves the right to continue this bid for an additional sixty (60) day grace period, under the same rates, terms, and conditions for the unforeseen delay in award of new bid for the next contract term.

4. **Consideration.** As consideration for rendering the Service provided for in this Contract, the County agrees to pay Company the amounts specified in **Exhibit “B”**, payable against written invoice submitted by Company in accordance with the Texas Prompt Payment Act, Tex. Govt. Code Ch. 2251.

5. **Licenses/Certifications.** As a condition of this Contract, Company shall hold and maintain throughout the term of this Contract all licenses and permits required, or which may be required by any authority, including the State of Texas, during the term hereof to provide the Services. Company further represents that it is qualified to perform and execute the services described above. If such license or permit is suspended or revoked, this Contract shall automatically be terminated and Company shall immediately notify the County. Company shall provide the County with all current state certifications, permits, and/or licenses with applicable seals, or as otherwise required by the State of Texas.

6. **Equipment.** If applicable, Company shall provide a sufficient number of trucks, vehicles, personnel and equipment available to safely and efficiently provide the Services. All trucks or vehicles operated by the Company to perform the Services shall contain all equipment required by any authority to operate on streets and roads and all persons in the employ of Company who operate such trucks or vehicles shall have the required licenses, qualifications, skill, and expertise to perform such Services and shall comply with all laws, rules, and regulations prescribed by any agency or authority having jurisdiction with regard to the operation of such trucks or vehicles in providing the Services.

7. **Independent Contractor.** The Company must comply with all applicable Hidalgo County policies and with any applicable federal, state, or local laws, regulations, orders, or ordinances applicable to the Services provided by Company under this Agreement. Notwithstanding the foregoing sentence, Company represents and maintains that Company is an Independent Contractor and is not an employee of the County, or any agency thereof, and represents and warrants that Company does not desire or request any fringe benefits provided to employees of

County, and/or any agency of the County, including but not limited to benefits associated with Hidalgo County's Civil Service Program. This Contract and the performance by the Parties hereunder does not create an agency relationship or master-servant relationship. Company agrees to be responsible for any federal income tax, withholding or social security tax liability that might arise from payments received hereunder. Company will incur no financial obligation on behalf of the County without prior written approval of the County. Company will be responsible for all personal and professional expenses, including, but not limited to, membership fees and dues and expenses of attending conventions and meetings. The County will have no right to direct or control the details, manner or means by which Company or its affiliates provide the Services, except as otherwise set forth in this Agreement. Company agrees to not take any action that is detrimental to, or not in the best interest of the County.

8. **Termination.** County may terminate this Agreement without cause upon thirty (30) days written notice.

9. **Non-Exclusive Services of Company.** Hidalgo County reserves the right to request this Product, Good and/or service from other sources other than the Company and shall not be in violation of any terms or conditions of this Agreement.

10. **Insurance.** Consistent with its status as an independent contractor and at its sole expense, Company agrees that throughout the duration of the work under this contract and any extension hereof, it shall provide and maintain any and all insurances and abide by any requirements which are specified in the Procurement Packet/Specifications and/or which may be necessary in providing Services or are otherwise required by law. Insurance policies shall cover, but are not limited to, Company's activities and all persons, vehicles, equipment and property connected with providing Services, to include theft or loss. The amount of insurance required shall be in accordance with amounts specified by the County or as prescribed by law, but in no event shall any amount be less than the minimum amounts prescribed by law, including, but not limited to the Texas Tort Claims Act. These requirements do not establish limits of Company's liability. Any and all applicable insurance requirements and amounts are incorporated herein by reference for all purposes. Company is responsible for ensuring all required insurance policies are valid for the duration of the contract. All insurance policies are to be issued by an insurance company authorized to do business in the State of Texas and acceptable to County. Company shall cause all subcontractors utilized by Company to also comply with these specifications. Company shall furnish to County certificate(s) of coverage, and all renewals throughout the duration of the Project, issued by the insurer that such insurance is in full force and effect. (See **Exhibit "C"** attached hereto and incorporated herein for all purposes). For each applicable policy, Company shall name the County as an additional insured. Company shall notify County a minimum of thirty (30) days in advance of cancellation of all or part of a policy. Company shall make any other insurance documentation available to County upon request. Company will be considered in breach of contract should the Company fail to maintain an insurance policy in the minimum limits of liability and requirements identified above while performing services for and under this Agreement, and will be subject to default and immediate termination of the Agreement. Additionally, Company covenants and agrees to use its best efforts to maintain an insurance policy in the minimum limits of liability and requirements identified above until one year following the conclusion of this Agreement.

11. **INDEMNIFICATION.** COMPANY SHALL INDEMNIFY AND HOLD COUNTY, ITS ELECTED OFFICIALS, EMPLOYEES AND AGENTS HARMLESS FROM ANY AND ALL CLAIMS, ACTIONS, LIABILITY, DAMAGES, LOSSES AND EXPENSES (INCLUDING COSTS OF JUDGMENTS, SETTLEMENTS, COURT COSTS, AND ATTORNEYS' FEES, REGARDLESS OF THE OUTCOME OF SUCH CLAIM OR ACTION) CAUSED BY, RESULTING FROM, OR ALLEGING NEGLIGENT OR INTENTIONAL ACTS OR OMISSIONS OR ANY FAILURE TO PERFORM ANY OBLIGATION UNDERTAKEN OR ANY COVENANT IN THIS CONTRACT, WHETHER SUCH ACT, OMISSION, OR FAILURE WAS THE COMPANY'S OR THAT OF ANY PERSON PROVIDING SERVICES HEREUNDER THROUGH OR FOR THE COMPANY. UPON WRITTEN NOTICE FROM THE COUNTY, THE COMPANY WILL RESIST AND DEFEND AT ITS OWN EXPENSE, AND BY COUNSEL REASONABLY SATISFACTORY TO COUNTY, ANY SUCH CLAIM OR ACTION. THE COMPANY WILL CARRY PROPER INSURANCE WITH THE COUNTY AS AN ADDITIONAL NAMED INSURED. THIS INDEMNIFICATION CLAUSE SHALL SURVIVE THIS AGREEMENT AND BE ENFORCEABLE AS A SEPARATE AGREEMENT IN THE EVENT ITS SURVIVAL AND ENFORCEMENT BECOME NECESSARY.

12. **Notice.** Except as may be otherwise specifically provided in this Agreement, all notices, demands, requests, or communications required or permitted hereunder shall be in writing and shall either be (i) personally delivered against a written receipt, or (ii) sent by registered or certified mail, return receipt requested, postage prepaid and addressed to the parties at the addresses set forth below, or at such other addresses as may have been theretofore specified by written notice delivered in accordance herewith:

If to County:           The County of Hidalgo  
                                  Attn: County Judge  
                                  100 E. Cano, 2nd Floor  
                                  Edinburg, Texas 78539

If to Company:        Company Name: Ortegon Insurance Agency, LLC  
                                  Attn: Yvonne Ortegon  
                                  505 S. Texas Blvd.  
                                  Weslaco, TX. 78596

Each notice, demand, request, or communication which shall be delivered or mailed in the manner described above shall be deemed sufficiently given for all purposes at such time as it is personally delivered to the addresses or if mailed at such time as it is deposited in the United States mail.

13. **GENERAL PROVISIONS.**

- a. **Assignment.** Except as otherwise herein provided, Company shall not assign the obligations or rights under this Agreement to any person without the prior written consent of County.
- b. **Conflict with Applicable Laws.** Nothing in this Agreement shall be construed so as to require the commission of any act contrary to law, and whenever there is any conflict between any provision of this Agreement and any present or future law, ordinance or administrative, executive or judicial regulation, order or decree, or amendment thereof, contrary to which the

parties have no legal right to contract, the latter shall prevail, but in such event, the affected provision or provisions of this Agreement shall be modified only to the extent necessary to bring them within the legal requirements and only during the time such conflict exists. In case any one or more of the provisions contained in this Agreement shall for any reason be held to be invalid, illegal or unenforceable in any respect, such invalidity, illegality, or unenforceability shall not affect any other provision thereof and this Agreement shall be construed as if such invalid, illegal, or unenforceable provision had never been contained herein.

- c. **No Waiver.** No waiver by County of any breach of any provision of this Agreement shall be deemed to be a waiver of any preceding or succeeding breach of the same or any other provision hereof.
- d. **Governing Law.** This Agreement shall be construed under and in accordance with the laws of the State of Texas, and all obligations of the parties created hereunder are performable in Hidalgo County, Texas. The Company hereby consents to personal jurisdiction in Hidalgo County, Texas.
- e. **Successors.** This Agreement shall be binding upon and inure to the benefit of and be enforceable by the parties hereto and their respective heirs, executors, administrators, legal representatives, successors, and assigns where permitted by this Agreement.
- f. **Commitment of Current Revenues Only.** In the event that, during any term hereof, the Commissioners Court does not appropriate sufficient funds to meet the obligations of County under this Agreement, County may terminate this Agreement upon ninety (90) days written notice to Company. County agrees, however, to use reasonable efforts to secure funds necessary for the continued performance of this Agreement. The parties intend this provision to be a continuing right to terminate this Agreement at the expiration of each budget period of County. *Agreements for the acquisition, including lease of real or personal property under Tex. Loc. Govt. Code §271.903:* In the event that, during any term hereof, the Commissioner's Court does not appropriate sufficient funds to meet the obligations of County under this Agreement, County may terminate this Agreement upon ninety (90) days written notice to Company, County agrees, however, to use a best efforts attempt to obtain and appropriate funds for payment of the Agreement. The parties intend this provision, if applicable, to be a continuing right to terminate this at the expiration of each budget period of County in accordance with the Texas Local Government Code.
- g. **Immunities.** Nothing in this Agreement is intended to and County does not hereby waive, release or relinquish any right to assert any of the defenses County enjoys by virtue of the state or federal constitution, laws, rules or regulations, and any sovereign, official or qualified immunity available to County as to any claim or action of any person, entity, or individual against County.

- h. **Headings.** The headings and captions contained in this Agreement are solely for convenient reference and shall not be deemed to affect the meaning or interpretation of any provision or paragraph hereof.
- i. **Gender and Number.** All pronouns used in this Agreement shall include the other gender, whether used in the masculine, feminine or neuter gender, and the singular shall include the plural whenever and as often as may be appropriate.
- j. **Entire Agreement.** This Agreement contains the entire agreement between the parties hereto, and each party acknowledges that neither has made (either directly or through any agent or representative) any representations or agreements in connection with this Agreement not specifically set forth herein. This Agreement may be modified or amended only by an agreement in writing executed by County and Company, and not otherwise.
- k. **Purchasing Ethics.** Company represents and warrants it has not, during the process of being awarded this contract violated the following ethical standards of County and, upon and after the execution of this Agreement, agrees to abide by the following ethical standards of County:
  - i. It shall be a breach of ethics to offer, give or agree to give any elected official, department head or employee, or former elected official, department head or employee, of County, or for any elected official, department head or employee or former elected official, department head or employee of County, to solicit, demand, accept or agree to accept from another person, entity or organization, a gratuity or an office of employment in connection with any decision, approval, disapproval, recommendation, preparation or any part of a program requirement or purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing, or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy, or other particular matter pertaining to any program requirement or a contract or subcontract, or to any solicitation or proposal therefore pending before any department or agency of County.
  - ii. It shall be a breach of ethics for any payment, gratuity or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor for any contract for County, or any person associated therewith, as an inducement for the award of a subcontract or order.
- l. **Void Contract.** Company understands that an awarded contract may immediately become void if the County determines that a lack of compliance with applicable policies and/or statutes has occurred in the procurement process.
- m. **Nondiscrimination.** Company, including subcontractors, assignees and successors in interest, ensures that no person shall on the grounds of race, religion, color, national origin, sex, age, or disability, or any other protected class under law, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination or retaliation in any federally or non-federally funded program or activity when providing any services described herein under

this contract/agreement. Applicable nondiscrimination statements and provisions of Title VI of the Civil Rights Act of 1964, as amended, were provided as part of the initial procurement packet and are incorporated herein and made a part of this agreement for all purposes.

- n. **Additional Documents.** The parties hereto covenant and agree that they will execute each such other and further instruments and documents as are or may become necessary or convenient to effectuate and carry out the terms of this Agreement.
- o. **Required Contract Provision for Contracts Subject to Federal Award (*if applicable*).** Pursuant to 2 CFR 200.327, a non-federal entity's contracts must contain the applicable provisions described in appendix II to 2 CFR 200-Contract Provisions for non-Federal Entity Contracts under Federal Awards. Additionally, County contracts under Federal award which are subject to assistance from the Federal Emergency Management Agency (FEMA) are also required to contain additional contract clauses. The applicable required contract clauses were provided as part of the initial procurement packet and are incorporated herein and made part of this agreement for all purposes.
- p. **Authority to Execute.** The execution and performance of this Agreement by County and Company have been duly authorized by all necessary laws, resolutions, or corporate action, and this Agreement constitutes the valid and enforceable obligations of County and Company in accordance with its terms.

[SIGNATURE PAGE TO FOLLOW]

**EXECUTED** as of the day and year first written above.

**APPROVED BY COMMISSIONERS' COURT ON May 14, 2024.**

**Agenda Item No. 95315**

**Executive Office:** *MS*

**VENDOR:**

Ortegon Insurance Agency, LLC

**COUNTY:**

COUNTY OF HIDALGO, Texas

*Yvonne Ortegon*

Yvonne Ortegon

*Richard F. Cortez*

Hon. Richard F. Cortez, County Judge

**APPROVED AS TO FORM**

Office of the Hidalgo County  
Criminal District Attorney,  
Toribio "Terry" Palacios

**ATTEST:**



*Michelle Lopez*

Michelle Lopez (May 16, 2024 12:35 CDT)

Michelle Lopez, Assistant District Attorney

*Arturo Guajardo Jr.*

Arturo Guajardo, Jr., County Clerk

**ATTACHMENTS:**

(If Applicable)

**SUPPLEMENTAL SIGNATURES:**

(If Applicable)



## **EXHIBIT "A"**

---

**REQUEST FOR PROPOSALS (RFP)  
PROCUREMENT PACKET**



**HIDALGO COUNTY  
PROCUREMENT PACKET**

**REQUEST FOR PROPOSAL**

**RFP No.: 23-0342-02-14-08**

**CONSULTING SERVICES FOR SELF-FUNDED  
HEALTH PLAN**

**Acceptance Due Date: February 14, 2024 at 3:00 pm**

Ignacio Amezcua MBA, CTCM, CTCO  
Hidalgo County Purchasing Director

**Project Contact Information:**

**Cassandra Carr**, Contract Specialist II  
(956) 318-2626 Ext: 4858  
cassandra.carr@co.hidalgo.tx.us

Hidalgo County  
REQUEST FOR PROPOSAL  
Consulting Services For Self-Funded Health Plan

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# 1. INVITATION LETTER

## 1.1. Summary

RELEASE DATE: Saturday, January 27, 2024

**RE: HIDALGO COUNTY - REQUEST FOR PROPOSALS**

**RFP NO.:23-0342-02-14-08** –Consulting Services For Self-Funded Health Plan

Dear Prospect Offeror:

Hidalgo County Purchasing Department welcomes and appreciates your interest and participation. For your review and consideration, enclosed find the procurement packet for the aforementioned project. Modifications and new requirements have been added and implemented. Please ensure to carefully read and review all instructions, requirements and specifications. All times referenced in this procurement packet are Central Standard Time – CST.

If assistance is required, please do not hesitate to call the Purchasing Department at (956) 318-2626.

Sincerely,

Ignacio Amezcua, MBA, CTCM, CTCD

Hidalgo County Purchasing Director

## 1.2. Contact Information

**Project Contact:**

**Olga Garza**

Contracts Division Manager  
2802 S. Business Highway 281  
Edinburg, TX 78539

Email: [olga.garza@co.hidalgo.tx.us](mailto:olga.garza@co.hidalgo.tx.us)

Phone:  [\(956\) 318-2626 Ext: 4882](tel:(956)318-2626)

**Procurement Contact:**

**Cassandra Carr**

Contract Specialist II  
2802 S. Bus Hwy 281  
Edinburg, TX 78539

Email: [cassandra.carr@co.hidalgo.tx.us](mailto:cassandra.carr@co.hidalgo.tx.us)

Phone:  [\(956\) 318-2626 Ext: 4858](tel:(956)318-2626)

**Department:**

Human Resources Dept./Civil Service

## 1.3. Timeline

<b>Release Project Date</b>	January 27, 2024
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<p><b>Question Submission Deadline</b></p>	<p>February 7, 2024, 5:00pm</p>
<p><b>Question Response Deadline</b></p>	<p>February 9, 2024, 5:00pm</p>
<p><b>Proposal Submission Deadline</b></p>	<p>February 14, 2024, 3:00pm          (All times referenced in this procurement packet are Central Standard Time –CST)</p> <p>The proposal opening is open to the public. Proposal opening participants may attend the proposal opening in person at the Hidalgo County Purchasing Department (or designated location) or via a live stream (link below) or by calling in on the day of the event. Please be advised, public attendance at any in-person Proposal opening may be limited due to capacity and will be on a first-come-first-serve basis.</p> <p>Live stream:  <a href="https://hidalgocounty.zoom.us/j/96464676754?pwd=K1hiY3YxN0xPem5pd2xZazYzWHF4UT09">https://hidalgocounty.zoom.us/j/96464676754?pwd=K1hiY3YxN0xPem5pd2xZazYzWHF4UT09</a></p> <p>Meeting ID: 964 6467 6754</p> <p>Passcode: 545411</p> <p>Dial by your location: +1 346 248 7799 US (Houston)</p> <p>To find your local number:  <a href="https://hidalgocounty.zoom.us/u/abObUBYixl">https://hidalgocounty.zoom.us/u/abObUBYixl</a></p> <p>Join by SIP: <a href="mailto:96464676754@zoomcrc.com">96464676754@zoomcrc.com</a></p>

## 2. SUBMISSION DETAILS

### 2.1. SUBMISSION OPTIONS & REQUIREMENTS

Respondents have two (2) options for submitting a response. Respondents shall submit their response using one (1) of the following methods (**DO NOT** duplicate submittals by submitting both an electronic and hard copy response. Respondents shall select one only (1) method to respond):

- A. Submit responses electronically via the PORTAL: <https://procurement.opengov.com/portal/co-hidalgo-tx> on or before Wednesday, February 14, 2024, at 3:00 pm. **OR;**
- B. Submit one (1) hard copy and two (2) USBs in original PDF format via personal hand-delivery or delivery service on or Wednesday, February 14, 2024, at 3:00 pm.

Any Proposal received after this deadline will not be accepted and will be returned unopened to the sender.

### 2.2. HAND DELIVERED SUBMISSION

When hand delivering the packet, Proposer should make sure that the package is stamped with the date and time received by the Hidalgo County Purchasing staff.

#### **DELIVER TO:**

##### US Postal Mail Address:

- Ignacio Amezcua, MBA, CTCM, CTCD, Purchasing Director
- ATTN: Cassandra Carr
- Hidalgo County Purchasing Department
- Administration Building
- 2812 S. Business Hwy 281
- Edinburg, Texas 78539

##### Physical Address:

- Ignacio Amezcua, MBA, CTCM, CTCD, Purchasing Director
- ATTN: Cassandra Carr
- Hidalgo County Purchasing Department
- Administration Building
- 2802 S. Business Hwy. 281
- Edinburg, Texas 78539

#### **FIRM INSTRUCTIONS**

Responses to this procurement packet shall be formatted and organized in the following order for consistency and easy screening:

- All submissions must be typed, single-spaced, and printed one-sided on 8 ½” by 11” paper.
- One (1) hard copy, marked “ORIGINAL” and two (2) USBs in PDF format. The original document must be submitted with a Cover Page containing the information listed in the Submission Outline/Checklist, under the Submission Cover Page.
- The complete response must be sealed in an appropriately sized envelope or box for delivery to the Hidalgo County Purchasing Department, per instructions in the Procurement Packet Submission paragraph of the Legal Notice section contained within this procurement packet.
- All documents must be labeled with the firm’s name and the RFP number. Responses that are not identified with the RFP number on the outside, will be at risk of rejection.

### **SUBMISSION OUTLINE/CHECKLIST**

To assist in ensuring all submissions received are complete, it is recommended for the Offeror to use this Submission Outline as a Checklist prior to submitting a response. All Responses must be submitted in the following order with the guidelines provided within this solicitation. **For the hand delivery option, the solicitation packet and all required documents can be found under the [#ATTACHMENTS](#) section:**

#### A. Cover Sheet

1. Company Name, Company Address, Company Phone Number
2. Project Name: Consulting Services For Self-Funded Health Plan
3. Procurement Number: 23-0342-02-14-08
4. Opening Date: Wednesday, February 14, 2024
5. Opening Time: 3:00 pm

#### B. Table of Contents

#### C. Required Confirmations/Documents

1. Legal Notice Declaration - **(Confirmation)**
2. Appendix "B" - Evaluation Criteria
3. Appendix "C" - Insurance Requirements
  - a. Proof of Insurance - **(Document)**
  - b. Insurance Requirement Acknowledgement - **(Confirmation)**
  - c. Project Requirements Acknowledgement - **(Confirmation)**
4. Appendix "D" - Conflict of Interest Questionnaire
  - a. CIQ Form - Copy of County Clerk File with fee receipt (when applicable) **(Document)**

5. Appendix "E" - Vendor Acknowledgment and HUB Declaration
  - a. Vendor Acknowledgment - **(Confirmation)**
  - b. HUB Declaration - **(Document)**
6. Appendix "F" - Certification Regarding Debarment
  - a. Signed Certification - **(Document)**
  - b. SAM.gov Registration Acknowledgement - **(Document)**
7. Appendix "G" - Title VI Appendices
  - a. Title VI Appendices [A -E] - **(Confirmation)**
8. Appendix "H" - Required Contract Clauses For Contracts Under Federal Award
  - a. Byrd Anti-Lobbying Contract Clause - **(Document)**
  - b. 2 CFR 200 Certification - **(Document)**
9. Appendix "I" - FHWA 1273
  - a. FHWA 1273 **(Confirmation)**
10. Appendix "J" - Proposer's Affidavit - **(Document)**
11. Appendix "K" - Draft Agreement - **(Confirmation)**
12. Appendix "L" - Deficiencies and Deviations Form **(Document)**
13. Appendix "M" - References - **(Document)**
14. Company/Firm Response - **(Document)**
15. Addenda (when applicable; see Addenda under Legal Notice) - **(Confirmation)**

**(Confirmation)** = A confirmation is required for this section.

**(Document)** = A document submission is required for this section.

### 2.3. ELECTRONIC SUBMISSION

Hidalgo County Purchasing Department will only accept electronic responses that are submitted via the PORTAL: <https://procurement.opengov.com/portal/co-hidalgo-tx>. The COUNTY will NOT accept telegraphic, emailed, nor responses submitted via facsimile.

\*When submitting a response electronically, the firm will be required to complete all the sections found in this solicitation in order for the submission to be valid.

### 3. PROCUREMENT OVERVIEW

**THE RESPONDENT IS RESPONSIBLE FOR READING AND UNDERSTANDING ALL DOCUMENTS, FORMS, SPECIFICATIONS, AND INSTRUCTIONS WITHIN THIS ENTIRE DOCUMENT. Follow all instructions; you are responsible for obtaining any information needed in order to respond to this solicitation. Further, the Respondent is responsible for providing any and all relevant information necessary to submit a response. Failure to do so will be at the Respondent's risk and may result in rejection of the response as non-conforming.**

General Requirements apply to all advertised solicitations; however, these may be superseded, whole or in part, by OTHER DATA CONTAINED HEREIN. Review the Table of Contents. Be sure your proposal package is complete.

#### 3.1. INTRODUCTION

Hidalgo County (hereinafter referred to as "COUNTY") is seeking qualified respondents interested in providing services for the "Consulting Services For Self-Funded Health Plan". Proposals will be received in accordance with the requirements attached hereto as Appendix "A". The response should address all requirements.

#### 3.2. Pre-Proposal Meeting

If there will be a Pre-Proposal meeting the information will be included in Section 1 – Invitation Letter/Timeline.

#### 3.3. AWARD

No award can be made until approved by Hidalgo County Commissioners Court. This RFP does not obligate Hidalgo County to the eventual purchase of any product and/or service described, implied or which may be proposed. Progress toward this end is solely at the discretion of Hidalgo County and may be terminated at any time prior to execution of an agreement.

(a) Before awarding any contract, Hidalgo County Purchasing Department will verify, using the Federal System for Award Management (SAM) and the Texas Comptroller's Debarred Vendor List, that the offeror recommended for contract award has no unsatisfactory performance history that would prohibit awarding them a contract.

(b) The contract will be awarded to that responsible offeror(s) whose offer, conforming to the solicitation, will be most advantageous to the county, price and other factors considered. A responsible offeror is one who affirmatively demonstrates to the County that the offeror has adequate financial resources and the requisite capacity, capability, and facilities to perform the contract within the delivery period or period of performance, has a satisfactory record of performance on other comparable projects, has a satisfactory record of integrity and business ethics, and is otherwise qualified and eligible to receive award under the solicitation and laws or regulations applicable to this procurement.

(c) The County reserves the right to accept other than the lowest offer, reject any or all offers in part or in total for any reason, to accept any offer if considered best for its interest, and to waive informalities and minor irregularities in offers received.

(d) The County may accept any item or group of items of any offer, unless the offeror qualifies the offer by specific limitations. Unless otherwise provided in Pricing Schedule, offers may not be submitted for any quantities less than those specified, and the County reserves the right to make an award on any item for a unit quantity less than the quantity offered at the unit prices offered unless the offeror specifies otherwise in the offer.

(e) The County's execution of the Contract shall be deemed to result in a binding contract without further action by the offeror.

(f) The County may, within the time specified therein, accept any offer or part thereof, as provided in (c) above, whether or not there are negotiations subsequent to its receipt, unless the offer is withdrawn by written notice received by the County prior to award.

(g) The County may award a contract, based on initial offers received, without discussion of such offers. Accordingly, each initial offer should be submitted on the most favorable terms from a price and technical standpoint, which the offeror can submit to the County.

### 3.4. TERM

It is intended that the initial contract term will be for one (1) year(s) commencing on the date approved by Commissioners Court; with the County's option to renew/extend for an additional three (3) one (1) year term(s), under the same rates, terms, and conditions.

### 3.5. SUBMISSION OPTIONS & REQUIREMENTS

Respondents have two (2) options for submitting a response and shall select only one (1) method to respond. Please see Section 2 – Submission Details above for submission options, procedures, and requirements. Any Proposal received after the provided deadline will not be accepted and will be returned unopened to the sender.

### 3.6. PROPOSAL OPENING STREAMING

Please find the proposal opening information included in Section 1 – Invitation Letter

### 3.7. HAND DELIVERED SUBMISSION

If Respondent chooses to hand deliver its submission, whether personally or via delivery service, it must follow the procedures and requirements set for in Section 2 – Submission Details above.

### 3.8. ELECTRONIC SUBMISSION

If Respondent chooses to submit its response electronically, it must follow the procedures and requirements set for in Section 2 – Submission Details above.

### 3.9. SIGNING OF SUBMISSION

In order to be considered, all submittals **must** be signed by an authorized representative of the firm. **For hardcopy submissions, please sign the original in blue ink and ensure the copy is clearly labeled. For electronic submissions, please ensure all appropriate certifications are marked.**

### 3.10. QUESTIONS AND ANSWERS

Questions must be submitted via the PORTAL'S Question and Answer Tab (Q&A) no later than Wednesday, February 7, 2024, at 5:00 pm. Responses to properly submitted questions will be published in the PORTAL and emailed to all planholders who are listed as a Follower in the PORTAL. Telephone inquiries will not be accepted.

### 3.11. RESTRICTIVE OR AMBIGUOUS REQUIREMENTS

It is the responsibility of the Proposer to review the procurement packet and to notify the Hidalgo County Purchasing Department if the requirements are formulated in a manner that would unnecessarily restrict competition or request clarification of any requirements that are ambiguous. Any such protest or question regarding the requirements or proposal procedures must be received in writing via the PORTAL'S Q&A Tab by the deadline stated for Questions and Answers.

### 3.12. COST OF SUBMISSION

Hidalgo County will not be liable for any costs incurred by the vendor in preparing a response to this procurement packet. Each Proposer acknowledges it is submitting a response at their own risk and expense. Further, no reimbursement for such charges or expenses shall be passed onto Hidalgo County. Hidalgo County makes no guarantee that any products or services will be purchased as a result of this solicitation and reserves the right to reject any and all submissions received. All responses and accompanying documentation will become the property of Hidalgo County.

### 3.13. WAIVING OF INFORMALITIES

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

### 3.14. NOTICE OF COMMUNICATION

***All communications by a vendor to the county, its officials, and department heads regarding this procurement shall be done through the Hidalgo County Purchasing Department.*** No vendor, its' representative, agent, or employee shall engage in private communication with a member of the Hidalgo County Commissioners Court or county department heads regarding any procurement of goods or services by the County from the date that this procurement packet is released. No private communication regarding the purchase shall be permitted until the procurement process is complete and a purchase order is granted or a contract is entered into. "Private Communication" means communication with any vendor outside of a posted meeting of the governing body, a regular meeting of a standing or appointed committee, or negotiation with a vendor which has been specifically authorized by the governing body.

## 4. LEGAL NOTICE

These General Provisions are considered standard language for an Offeror (hereinafter referred to as “Offeror”, “Vendor”, “Respondent”, or “Contractor”) submitting a response for a Request for Bids, Proposals, Qualifications or other solicitation (hereinafter referred to as “Procurement Packet”) made by the County of Hidalgo (hereinafter referred to as “Hidalgo County” and “County” or any other governing body/agency for which the Hidalgo County Purchasing Department has been authorized to perform procurement services. The Hidalgo County Purchasing Department webpage may be found at <https://www.hidalgocounty.us/143/Purchasing-Department>.

It is the Offeror’s sole responsibility to be in compliance of all federal, state, and local laws, requirements, rules, codes, ordinances, and regulations applicable to their proposed goods and/or services. In the event of any conflict between the terms and provisions of these requirements and the specifications, the specifications shall govern. In the event of any conflict of interpretation of any part of this overall procurement packet, Hidalgo County's interpretation shall govern. Referenced appendices may be subject to change.

The following is a link to all adopted Hidalgo County policies (<https://www.hidalgocounty.us/805/CountyAdministrative-Policies>), which for all purposes, when applicable and whether specified explicitly or not, are incorporated by reference as part of this procurement packet and any resulting agreement.

### 4.1. ACCEPTANCE OF SUBMISSION

Receipt of the submission shall under no circumstance obligate Hidalgo County to accept the response, or make an award. The Offeror is responsible for obtaining any information needed in order to respond and for all costs of submitting its response. An Offeror’s submitted response is to remain firm for a minimum of ninety (90) days after opening. Hidalgo County is not responsible for any missing, lost, or late submissions.

### 4.2. ACCESS TO RECORDS

In special circumstances, Vendor may be required to allow duly authorized representatives of Hidalgo County, or the state and federal government access to contracts, books, documents, and records necessary to verify the nature and extent of the cost of services provided by Vendor. Vendor must keep records within Hidalgo County or note in their submission that records will be available within the boundaries of Hidalgo County to those representatives within one (1) business day of request by the County.

### 4.3. ACCOUNT CREATION FOR PAYMENT

Upon award and prior to execution of a contract, Offeror shall cooperate with and submit any required information to the Hidalgo County Auditor’s Office in order to establish an account with the County for payment, including information requested on Hidalgo County Vendor Enrollment Solution, Appendix “E” on this procurement packet. This information must be on file with the Hidalgo County Purchasing Department and the Hidalgo County Auditor’s Office. Failure to provide this information may result in a delay in payment and/or back-up withholding as required by the Internal Revenue Service.

#### 4.4. ADDENDA

When specifications interpretations, amendments, corrections or changes are revised, the Hidalgo County Purchasing Department will issue an Addendum addressing the nature of the change. All released Addenda will be e-mailed to all point of contact(s) who are known to have received or requested a copy of the procurement packet directly from the Hidalgo County Purchasing Department. Offeror must sign in blue ink and include it in the returned submission package.

#### 4.5. ASSIGNMENT

The successful Offeror shall not assign, sell, transfer, convey, or otherwise transfer its rights under any awarded contract, in whole or in part, without the prior written consent of County of Hidalgo County Commissioners Court (hereinafter referred to as “Commissioners Court”), or other applicable governing body.

#### 4.6. AWARD

Hidalgo County reserves the right to award this contract on the basis determined on the Procurement Overview, and when applicable, listed on Appendix “B”, in accordance with the laws of the State of Texas, to waive any formality or irregularity, to make awards to more than one Offeror, and to reject any or all submissions received. After Hidalgo County Commissioners’ Court approves an award, and the awarded Contractor defaults in meeting the general requirements and/or specifications in complying with the contract agreement, Hidalgo County reserves the right to seek the services of the next lowest bidder(s) and/or qualified Offeror(s). In such event, Hidalgo County shall charge the Awarded Vendor the difference for any additional cost of such item. Hidalgo County reserves the right to add or delete items during the term of the contract under the same rates and conditions.

#### 4.7. COMPLIANCE WITH FEDERAL, STATE, AND LOCAL LAWS

The County will search a database maintained by the Texas State Comptroller which contains relevant vendor information. A contract may not be entered into with an entity that is identified therein. Search results shall be incorporated for all purposes as part of any resulting agreement entered into by the parties. The Offeror shall follow all federal, state, and local laws, requirements, rules, codes, ordinances, regulations and Hidalgo County Policy & Procedures applicable to their proposed goods and/or services, including, but not limited to those addressed within this procurement packet, the resulting agreement and the following:

**4.7.1 Attestation Terrorist Organizations - TEX. GOVT. CODE CH. 2252.** Pursuant to the Texas Government Code, including but not limited to Chapter’s 2252, 806 and 807, the Offeror warrants, represents, certifies and attests that, by submitting a response to this procurement packet and/or at the time of execution of this Contract, Agreement, or supplemental agreement thereafter, neither the Offeror, nor any wholly owned subsidiary, majority-owned subsidiary, parent company or affiliate of the same (i) engages in business with Iran, Sudan, or any foreign terrorist or (ii) is a company listed by the Texas Comptroller of Public Accounts.

**4.7.2 Breach of Ethics.** Contracts awarded hereunder shall be in compliance with Tex. Loc. Govt. Code Chapter 171: Regulation of Conflicts of Interest of Officers of Municipalities, Counties and Certain Other Local Governments.

It shall be a breach of ethics to offer, give, or agree to give any elected official, department head or employee, or former elected official, department head or employee, of the County, or for any elected

official, department head or employee or former elected official, department head or employee of the County, to solicit, demand, accept or agree to accept from another person, entity or organization, a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation or any part of a program requirement or purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing, or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy, or other particular matter pertaining to any program requirement or a contract or subcontract, or to any solicitation or response to a request therefore pending before any department or agency of the County.

It shall be a breach of ethics for any payment, gratuity or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor for any contract for the County, or any person associated therewith, as an inducement for the award of a subcontract or order.

**4.7.3 Bonds.** If this procurement packet requires submission of bid bond or proposal guarantee, and performance and payment bonds, an explanation of these requirements will be detailed on the Projects Requirements Acknowledgement listed in **Appendix “C”**. Responses submitted without the required bond or cashier's checks may be deemed unresponsive, thus disqualified from participation.

**4.7.4 Boycott Energy Companies Verification – TEX. GOVT. CODE 2274.** In accordance with changes to the law from the 87th Legislature in 2021, a for-profit company, not including a sole proprietorship, with ten or more full-time employees, is required to verify in writing that it does not boycott energy companies, and it will not boycott energy companies during the term of the Contract, if it is a contract for goods or services that has a value of at least \$100,000 that is paid wholly or partly from public funds of the governmental body. **Written verification may be provided by signing the Legal Notice Declarations page.** Please provide a written notification if your company is unable to provide the written verification referenced above.

As per Tex. Gov't. Code §809.001(1), "Boycott energy company" means “without an ordinary business purpose, refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations with a company because the company: (A) engages in the exploration, production, utilization, transportation, sale, or manufacturing of February 15, 2023 fossil fuel-based energy and does not commit or pledge to meet environmental standards beyond applicable federal and state law; or (B) does business with a company described by Paragraph (A)”.

As per Ch. 2274(c), this verification requirement does not apply to the County if it determines that this requirement is inconsistent with the County's constitutional or statutory duties related to the issuance, incurrence, or management of debt obligations or the deposit, custody, management, borrowing, or investment of funds.

**4.7.5 Boycott Israel Verification - TEX. GOVT. CODE 2270.** In accordance with the Texas Government Code, including but not limited to Chapters 2270 and 808, a company, other than a sole proprietorship, with ten or more full time employees is required to certify in writing that it does not boycott Israel and will not boycott Israel during the term of the Contract, if the Contract has a value of \$100,000 or more.

**4.7.6 Certification Regarding Debarment, Suspension Ineligibility, and Voluntary Exclusion.** The Offeror warrants and represents by execution of an award from their response to this procurement packet that it is not debarred, suspended, or otherwise excluded from or ineligible for participation in any Federal

programs, or state assistance, as described under Executive Order 12549, “Debarment and Suspension.” The Offeror agrees to include this certification in all contracts between itself and any subcontractors in connection with the services performed under any subsequent Contract or Agreement arising from this award. The Offeror also acknowledges that it is their sole responsibility to immediately notify Hidalgo County, in writing, if they or a subcontractor is not in compliance with Executive Order 12549 during the term of this contract. Further, Offeror agrees to refund Hidalgo County for any payments made to the contractor while ineligible. Pursuant to federal regulation 45 CFR Part 76, the Offeror is required to furnish a certification or acknowledgement stating that they are free from suspension and debarment through registration on System for Award Management at <http://www.sam.gov> with their response.

**4.7.7 Davis-Bacon Act/Hidalgo County Adopted Prevailing Wage Rate.** When applicable, in accordance with Texas Government Code, Chapter 2258, as well as any other applicable laws, any Contractor or Subcontractor performing contracts in excess of \$2,000, for the construction, alteration, or repair (including painting and decorating) of public buildings or public works must pay their laborers and mechanics employed under the contract no less than the locally prevailing wages and fringe benefits for corresponding work on similar projects in the area as per the Davis Bacon Act or the rates adopted by Hidalgo County.

The Offeror warrants and represents that it will pay all its workers all monies earned by its employees including, but not limited to regular wages, any overtime compensation, or any additional payments pursuant to the Fair Labor Standards Act, 29 U.S.C. Section 207 9a(1), as amended; the Texas Pay Day Act; the Equal Pay Act; Title VII of the Civil Rights Act of 1964, 42 U.S.C. Section 2000e, et al., as amended; and/or any provisions of the Texas Labor Code Ann., as amended, without cost or expenses to the County.

Awarded Vendors, its officers, agents, and/or employees will not be entitled to any benefits of an employee or elected official of Hidalgo County, including, but not limited to, benefits associated with Hidalgo County's civil service system.

**4.7.8 Disclosure of Conflict of Interest.**

**4.7.8.1 As an Offeror.** Pursuant to Texas Local Government Code, Chapter 176, an Offeror must disclose an interest between the Offeror, the Offeror’s employees and any Hidalgo County employees arising from relationships within the first degree of consanguinity or affinity. A financial interest arises if the County’s elected official, department head, or employee, or a member of their family, received any gifts valued in excess of \$250 during the preceding twelve (12) month period, or employment of any County’s elected official, department head, or employee, or the County official’s family member.

The Offeror shall not use funds to directly or indirectly pay any person for influencing or February 15, 2023 attempting to influence any County employee or official in connection with the awarding of any contract or the extension, continuation, renewal, amendment or modification of any contract.

**4.7.8.2 Certificate of Interested Parties (Form 1295).** Hidalgo County cannot enter into a contract until Form 1295 is submitted, as Texas law, including, but not limited to Tex. Govt. Code Ch. 2252, Title 1 Tex. Ethics Comm. Rules – Title 1, sec. 46 and the Tex. Admin. Code, requires all parties who enter into any contract with the County which must be approved by its governing body, to disclose all interested parties. Form 1295 must be completed in its entirety through the Texas Ethics Commission at the following website: [https://www.ethics.state.tx.us/whatsnew/elf\\_info\\_form1295.htm](https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm) prior to awarding the Contract. Failure to do so may result in delay of award, or deem your response unresponsive, thus disqualified from participation.

**4.7.8.3 Collusion.** The Offeror affirms that by responding to any solicitation made by Hidalgo County, it has not communicated directly or indirectly the response made to any competitor or any other person engaged in such line of business. Any or all responses may be rejected if the County believes that collusion exists among the Offerors, and/or the County believes prices provided by the Offerors are inappropriately unbalanced. Respondent's Affidavit (Appendix "J") must be included in the response.

**4.7.8.4 Consultants Excluded from Competition.** An outside Consultant or Contractor is prohibited from submitting a response for goods or services requested on a Hidalgo County project of which the Consultant or Contractor was a designer or other previous contributor, assisted in developing or drafting specifications, requirements, statements of work, or requests for goods and/or services must be excluded from competing for such procurements. If such, a Consultant or Contractor submits a response, that response shall be prohibited, and disqualified on the basis of conflict of interest, no matter when the conflict is discovered by Hidalgo County.

**4.7.8.5 Disclosure of Interested Parties (Form CIQ).** Offeror must fully disclose the existence of any relationships as defined above in its response to this procurement packet. The Conflict of Interest Questionnaire (CIQ), attached hereto as Appendix "D", must be filed with the Hidalgo County Clerk, located inside the Hidalgo County Courthouse no later than the seventh business day after the date the person becomes aware of facts that require the statement to be filed. Hidalgo County Clerk contact information may be found at <https://www.hidalgocounty.us/161/CountyClerks-Office>. **Completion and submission of Form CIQ is the sole responsibility of the Offeror.** Additionally, the Offeror must immediately notify Hidalgo County if the information provided in its response changes at any time.

**4.7.8.6 Disclosure to Report Lobbying.** When applicable, pursuant to 31 U.S.C.A. §1352(2003), if at any time during the contract term funding to Contractor exceeds \$100,000.00, Contractor shall file with the County the Federal Standard Form LLL titled "Disclosure Form to Report Lobbying" as detailed in Appendix "H".

**4.7.9. Discrimination Against Firearm Entities or Trade Associations Verification - Tex. Gov't. Code Ch. 2274.** In accordance with changes to the law from the 87th Legislature in 2021, a for-profit company, not including a sole proprietorship, with ten or more full-time employees, is required to verify in writing that it does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association and will not discriminate against a firearm entity or firearm trade association during the term of the Contract, if it is a contract for goods or services that has a value of at least \$100,000 that is paid wholly or partly from public funds of the governmental body. Written verification may be provided by signing the Legal Notice Declaration page. Please provide a written notification if your company is unable to provide the written verification referenced above.

As per Tex. Gov't. Code §2274.001(3), except as otherwise indicated, to "discriminate against a firearm entity or firearm trade association " means "with respect to the entity or association, to: (i) refuse to engage in the trade of any goods or services with the entity or association based solely on its status as a firearm February 15, 20237entity or firearm trade association; (ii) refrain from continuing an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association; or (iii) terminate an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association".

As per Ch. 2274, this verification requirement does not apply to the County if it contracts with a sole source provider, does not receive any bids from a company that is able to provide the required written

verification above, or the contract is exempt from compliance under Tex. Gov't. Code sec. 2274.003 relating to the issuance, sale or delivery of notes.

**4.7.10 Disqualification of Offeror.** By submitting a response to this request, an Offeror offering to sell supplies, materials, services, or equipment to Hidalgo County certifies that the Offeror has not violated the antitrust laws of this state codified in Texas Business and Commerce Code §15.01, et seq., as amended, or the federal antitrust laws. If multiple submissions are made by an Offeror and after they are opened, the Offeror requests to withdraw one of the submissions is requested to be withdrawn, the result will be that all of the responses submitted by that Offeror will be withdrawn; however, nothing herein prohibits an Offeror from submitting multiple responses for different products or services.

**4.7.11 Ethical Business Practices.** Hidalgo County operates its business ethically and in compliance with the law. We ask that any Offeror, their representative, and/or employee doing business with Hidalgo County, who believes they have witnessed any suspected ethical violation or fraud immediately report the allegations to the Hidalgo County Purchasing Director, 2802 S. BUS HWY 281, Edinburg, TX 78539, (956) 318-2626, ignacio.amezcua@co.hidalgo.tx.us.

Hidalgo County Purchasing Department will conduct a prompt and thorough investigation. At the conclusion of the investigation, Hidalgo County Purchasing Department will refer any suspected criminal activity to the Hidalgo County District Attorney or other appropriate law enforcement agency. Any Offeror who reports suspected ethical violations or fraud can do so without fear of retaliation. Retaliating against any offeror for reporting suspected ethical violations or fraud is strictly prohibited.

#### 4.8. COMPLIANCE WITH FEDERAL, STATE, AND LOCAL LAWS (CONTINUED)

**4.8.1 Historically Underutilized Business/Disadvantaged Business Enterprises.** The County is committed to ensuring that Historically Underutilized Businesses (HUB) and Disadvantaged Business Enterprises (DBE) such as small business enterprises (SBE), minority and women-owned business enterprises (MWBE) receive a fair and equal opportunity for participation in the County's procurement process. The County encourages the use of these enterprises both as prime and subcontractors as listed in **Appendix "E"**.

When federal funds are expended by the County, the County will take affirmative steps set forth in 2 CFR200.321 to assure that small, minority, women-owned businesses and labor surplus area owned firms are used when possible. Pursuant to 2 CFR 321, the County requires that a prime contractor who uses subcontractors take affirmative steps set forth in 2 CFR 200.321, including:

- a. Placing qualified small and minority business and women's business enterprises on solicitation lists;
- b. Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;
- c. Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;
- d. Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises; and
- e. Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce.

f. Nothing in this section is to be construed to require the County to award a contract other than as required by law and Hidalgo County policies and procedures.

When procurement is related to road construction projects with the Texas Department of Transportation February 15, 20237(TxDOT), all respondents must submit their HUB/DBE plans as part of their submission to be qualified to participate.

**4.8.2 Independent Contractor.** Offeror must comply with all applicable Hidalgo County policies and with any applicable federal, state, or local laws, regulations, orders, or ordinances applicable to the Services provided by Offeror under a contract entered into by the parties. Notwithstanding the foregoing sentence, Offeror represents and maintains that Offeror is an Independent Contractor and is not an employee of the County, or any agency thereof, and represents and warrants that Offeror does not desire or request any fringe benefits provided to employees of County, and/or any agency of the County, including but not limited to benefits associated with Hidalgo County's Civil Service Program. Any contract entered into between the parties and the performance of the same does not create an agency relationship or master servant relationship. Offeror agrees to be responsible for any federal income tax, withholding or social security tax liability that might arise from payments received under a contract. Offeror will incur no financial obligation on behalf of the County without prior written approval of the County. Offeror will be responsible for all personal and professional expenses, including, but not limited to, membership fees and dues and expenses of attending conventions and meetings. The County will have no right to direct or control the details, manner or means by which Offeror or its affiliates provide the Services, except as otherwise set forth in this packet and/or any contract entered into by the parties. Offeror agrees to not take any action that is detrimental to, or not in the best interest of the County.

**4.8.3 Nondiscrimination.** By submitting a response to this procurement packet, the Offeror certifies that it will conform to the provisions of the Federal Civil Rights Act of 1964, as amended and related state and federal law. Offeror, during the performance of this contract, will not discriminate against any employee or applicant for employment because of race, religion, color, national origin, sex, age, disability or any other protected class under law (except as allowed in the case of bona fide occupational qualifications).

**4.8.4 Texas Public Information Act.** The Offeror understands and agrees that Hidalgo County is a governmental body for purposes of the Public Information Act, codified as Chapter 552 of the Texas Government Code and as such is required to release information in accordance with the Public Information Act (the "Act"). Hidalgo County must rely on advice, decisions and opinions of the Attorney General of the State of Texas relative to the disclosure of data or information. Submissions will be kept confidential in accordance with the Act and applicable law, and **submissions are subject to inclusion into the public record after award.** To the extent permitted by law, Offeror may request in writing non-disclosure of any information that it considers to be confidential, proprietary, and/or trade secret in its submission. Such data shall accompany the submission, be readily separable from the response, and shall be CLEARLY MARKED "**CONFIDENTIAL, PROPRIETARY and/or TRADE SECRET**". Hidalgo County will make reasonable efforts to provide Offeror notice in accordance with the Act in the event the County receives a request for information under the Act for information that the Offeror has marked as indicated above. E-mail addresses provided by Offeror to the County as part of its response to this procurement packet are not confidential. Additionally, Offeror provides its affirmative consent to the disclosure of its email addresses, including from its employees, officers, and agents acting on its behalf, that are provided to Hidalgo County. This consent shall survive termination of this agreement and apply to any e-mail address provided in any form for any reason whether related to this procurement packet or otherwise.

**4.8.5 Title VI Notice.** The County of Hidalgo, in accordance with the provisions of Title VI of the Civil Rights Act of 1964 (78 Stat.252, 42 U.S.C. §§2000d to 2000d-4) and the Regulations, hereby notifies all respondents that it will affirmatively ensure that any contract entered into pursuant to this advertisement, disadvantaged business enterprises will be afforded full and fair opportunity to submit Bids in response to this invitation and will not be discriminated against on the grounds of race, color, or national origin in consideration for an award. Further, Title VI has been broadened by related statutes, regulations and executive orders as found in Appendices “A” through “E” as attached hereto as Appendix “G”. Offeror agrees to comply with Title VI as may be required. The Hidalgo County Title VI Nondiscrimination Plan may be found at <https://www.hidalgocounty.us/2071/Title-VINondiscrimination-Plan>.

#### **4.9. CONTRACT OBLIGATION**

Before a contract becomes binding on Hidalgo County or the Offeror, it must be awarded by the Hidalgo County Commissioners Court, signed by the Hidalgo County Judge, funds for it must be certified by the Hidalgo County Auditor, and an official Hidalgo County Purchase Order must be issued for it by the Hidalgo County Purchasing Department. Elected officials, department heads, other County employees or representatives are NOT authorized to sign agreements for Hidalgo County, unless prior authorization is approved by the Hidalgo County Commissioners Court, or respective governing body. Binding agreements shall remain in effect until all products and/or services covered by this procurement packet have been satisfactorily delivered and accepted.

#### **4.10. CONTRACT RENEWALS**

Any extension or renewal of the agreement entered into by the parties are made at the County’s sole discretion and under the same rates, terms and conditions as the initial agreement, or as amended.

#### **4.11. CONTRACT TRANSITION (Grace Period)**

In the event services end by either contract expiration or termination, it shall be required that the successful respondent continue services if requested by the Hidalgo County Purchasing Department, until new services can be completely operational. The successful respondent acknowledges its responsibility to cooperate fully with the replacement vendor and Hidalgo County to ensure a smooth and timely transition to the replacement vendor. Such transitional period shall not extend more than sixty (60) days beyond the expiration termination date of the contract, or any extension thereof. The successful respondent shall be reimbursed for services during the transitional period at the rate in effect when the transitional period clause is invoked by Hidalgo County. During any transition period, all other terms and conditions of the contract shall remain in full force and effect as originally written and subsequently amended.

#### **4.12. COST OF GOODS AND SERVICES**

Discount payments will be considered when offered. If during the life of any contract, or response awarded, the successful respondent’s net prices generally available to other customers for items awarded herein are reduced below the contracted price, it is understood and agreed that the benefits of such reduction shall be extended to Hidalgo County. Failure by the Vendor to notify the County of a decrease in costs for items and/or supplies for which the Vendor was granted a price adjustment, may result in immediate termination of this contract and the County shall not be obligated to pay the Vendor the difference between the contract price and the price adjustment.

#### 4.13. COUNTY APPROVED HOLIDAYS

The Offeror is advised that official County business will not be conducted on approved County holidays. The link of approved holidays can be found on: <https://www.hidalgocounty.us/115/County-Holidays>.

#### 4.14. EVALUATION

Evaluation shall be used as a determinant as to which proposed items or services are the most efficient and/or most economical for the County, considering all factors which have a bearing on price and performance of the items in the user department's environment. All submissions, except for Requests for Bids, may be subject to evaluations and negotiations by the Hidalgo County Purchasing Department, or authorized Hidalgo County representative as approved by Hidalgo County Commissioners Court, with recommendation to the appropriate governing body. Compliance with all requirements, delivery and needs of the user department are considerations in evaluating the responses received. **Pricing is NOT the only criteria for making a recommendation.** A preliminary evaluation by Hidalgo County will be held and appropriate responses will be subjected to the negotiating process and a request for a Best and Final Offer. Upon completion of the negotiations, Hidalgo County will make an award. All responses that have been submitted shall be available and open for public record after the contract is awarded, except for trade secrets or confidential information contained in the responses and identified as such.

Hidalgo County reserves the right to refuse and reject any or all submissions and to waive any or all formalities or technicalities, or to the qualifications considered the best and most advantageous to Hidalgo County. Additionally, Hidalgo County reserves the right to separate and accept or eliminate any item(s) listed under this procurement packet that it deems necessary to accommodate budgetary or operational requirements.

#### 4.15. FISCAL FUNDING

Hidalgo County has the discretion to utilize grant funding or general funding, however, should grant funding be utilized "Grant Funding" rules will apply. The award of a contract hereunder will not be construed to create a debt of the County which is payable out of funds beyond the current fiscal year. February 15, 2023<sup>7</sup> Additionally, should funds not be appropriated by the applicable governing body to continue the lease or contract in their sole discretion, said lease or contract shall become null and void on the last day of the current appropriation of funds.

**4.15.1 General Funding.** A multi-year lease or lease/purchase arrangement, or any contract continuing as a result of an extension option, must include a fiscal funding out provision in the lease or contract. Funds for this procurement have been provided through the County budget for this fiscal year only. Hidalgo County, on an annual basis and at their discretion, has the right to reconsider a contract during the budget process for ensuing years if financial resources of Hidalgo County are insufficient to meet the liabilities of said contract. After expiration of the lease, leased equipment shall be removed by the Vendor from the user department without penalty of any kind or form to Hidalgo County. All charges and physical activity related to delivery, installation, removal and re-delivery shall be the responsibility of the Vendor

**4.15.2 Grant Funding.** Any contract entered into by the County that is to be paid from grant funds shall be limited to payment from the grant funding, and the Offeror understands that the County has not set aside any County funds for the payment of obligations under a grant contract. If grant funding should become unavailable at any time for the continuation of services paid for by the grant, and further funding cannot be obtained for the contract, then the contract shall be null and void.

Additionally, County contracts subject to assistance from the Federal Emergency Management Agency (FEMA), require inclusion of the contract terms found in **Appendix “H”**. It is the County’s intention to comply with FEMA requirements; therefore, any conflict in terms should be resolved as such.

#### 4.16. FORCE MAJEURE

If by reason of Force Majeure either Party shall be rendered unable, wholly or in part, to carry out its responsibility under this contract by any occurrence by reason of Force Majeure, then the Party unable to carry out its responsibility shall give the other Party notice and full particulars of such Force Majeure in writing within a reasonable time after the occurrence of the event, and such notice shall suspend the Party’s responsibility for the continuance of the Force Majeure claimed, but for no longer period. Force Majeure means acts of God, floods, hurricanes, tropical storms, tornadoes, earthquakes, or other natural disasters, acts of a public enemy, acts of terrorism, sovereign conduct, riots, civil commotion, strikes or lockouts, and other causes that are not occasioned by either Party’s conduct which by the exercise of due diligence the Party is unable to overcome and which substantially interferes with operations.

#### 4.17. GOVERNING LAW

This procurement packet is governed by the competitive bidding requirements of the County Purchasing Act, Texas Local Government Code, §262.021 et seq., as amended. Offerors shall comply with all applicable federal, state and local laws and regulations. **Offeror is further advised that these requirements shall be fully governed by the laws of the State of Texas and venue shall be performable in a federal or state court or competent jurisdiction in Hidalgo County, Texas.** Hidalgo County may request and rely on advice, decisions and opinions of the Attorney General of Texas and the Hidalgo County District Attorney concerning any portion of these requirements. The County does not agree to binding arbitration and does not waive its right to a jury trial.

#### 4.18. HIPAA COMPLIANCE

When applicable, the Offeror agrees to comply with the requirements of the Health Insurance Portability and Accountability Act of 1996, Pub. L. No. 104-191 (codified at 45 C.F.R. Parts 160and164), as amended ("HIPAA"); privacy and security regulations promulgated by the United States Department of Health and Human Services ("DHHS"); Title XIII, Subtitle D of the American Recovery and Reinvestment Act of 2009, Pub. L. No. 111-5, as amended ("HITECH Act"); provisions regarding Confidentiality of Alcohol and Drug Abuse Patient Records (codified at 42 C.F.R. Part 2), as amended; and TEX. HEALTH & SAFETY CODE ANN. §§81.046, as amended, 181.001 et seq., as amended, 241.151 et seq., as amended, and 611.001 et seq., as amended collectively referred to as "HIPAA", to the extent that the Offeror uses, discloses or has access to protected health information as defined by HIPAA. Offeror may be required to enter a Business Associate Agreement pursuant to HIPAA.

#### 4.19. INDEMNIFICATION

**COMPANY SHALL INDEMNIFY AND HOLD COUNTY, ITS ELECTED OFFICIALS, EMPLOYEES AND AGENTS HARMLESS FROM ANY AND ALL CLAIMS, ACTIONS, LIABILITY, DAMAGES, LOSSES AND EXPENSES (INCLUDING COSTS OF JUDGMENTS, SETTLEMENTS, COURT COSTS, AND ATTORNEYS’ FEES, February 15, 2023 REGARDLESS OF THE OUTCOME OF SUCH CLAIM OR ACTION) CAUSED BY, RESULTING FROM, OR ALLEGING NEGLIGENT OR INTENTIONAL ACTS OR OMISSIONS OR ANY FAILURE TO PERFORM ANY OBLIGATION UNDERTAKEN OR ANY COVENANT IN THIS CONTRACT, WHETHER SUCH ACT, OMISSION, OR FAILURE WAS**

**THE COMPANY’S OR THAT OF ANY PERSON PROVIDING SERVICES HEREUNDER THROUGH OR FOR THE COMPANY. UPON WRITTEN NOTICE FROM THE COUNTY, THE COMPANY WILL RESIST AND DEFEND AT ITS OWN EXPENSE, AND BY COUNSEL REASONABLY SATISFACTORY TO COUNTY, ANY SUCH CLAIM OR ACTION. THE COMPANY WILL CARRY PROPER INSURANCE WITH THE COUNTY AS AN ADDITIONAL NAMED INSURED. THIS INDEMNIFICATION CLAUSE SHALL SURVIVE THIS AGREEMENT AND BE ENFORCEABLE AS A SEPARATE AGREEMENT IN THE EVENT ITS SURVIVAL AND ENFORCEMENT BECOME NECESSARY.**

#### 4.20. INSPECTIONS & TESTING

Hidalgo County reserves the right to inspect any item(s) or service location for compliance with specifications and requirements and needs of the user department. If an Offeror cannot furnish a sample of a proposed item, where applicable, for review, or fails to satisfactorily show an ability to perform, the County can reject the response as inadequate. The successful respondent shall warrant that all items/services shall conform to the specifications and/or all warranties provided under the Uniform Commercial Code and be free from all defects in material, workmanship and the like. Items supplied under a contract pursuant to this procurement packet shall be subject to the County’s approval. Items found to be defective or not meeting specifications shall be replaced by the successful Offeror within two (2) business days at no expense to the County. Items that are not picked up within one (1) week after notification shall be deemed a donation to the County and may be used or disposed of at the County's discretion, without waiver of any other rights of the County as to the items’ nonconformity.

#### 4.21. INSURANCE

Contractor shall procure and maintain, with respect to the subject matter of this procurement packet, appropriate insurance coverage including, as a minimum, public liability and property damage with adequate limits to cover contractor's liability as may arise directly or indirectly from work performed under terms of this procurement packet. Certification of such coverage must be provided to the County as part of this response. (See **Appendix “C”: Insurance Requirements**). Prior to award, Hidalgo County must be listed as a Certificate Holder to the policies.

#### 4.22. LEGAL DOCUMENTS

Offeror should submit any agreement for products and/or services which may be required by their organization to enter into a contract with Hidalgo County. The awarded vendor will be required to execute an agreement with Hidalgo County which finalizes the terms and conditions set forth in their response, best and final offer, and any negotiations between the Offeror and Hidalgo County. The agreement is subject to review and amendment by the Hidalgo County District Attorney’s Office.

#### 4.23. MAINTENANCE

Maintenance required for equipment proposed should be available in Hidalgo County by a manufacturer-authorized maintenance facility. Costs for this service shall be shown on **Appendix “B”**. If Hidalgo County opts to include maintenance, it shall be so stated in the purchase order and said cost will be included. Service will commence only upon expiration of applicable warranties and should be priced accordingly.

#### 4.24. MARKET VOLATILITY AND UNIT PRICE ADJUSTMENTS

When applicable, Hidalgo County recognizes that during periods of national crisis and unstable economic conditions, unforeseen price increase might affect costs for goods and services contracted on an annual basis. As such, upon written request of the Vendor to the County Purchasing Agent, the County may review evidence of prevailing industry-wide market conditions that may warrant an adjustment in bid prices contained in the contract. When applicable, the following procedure and conditions may be employed to mediate price volatility:

- A Vendor shall:
  - make its Market Volatility and Unit Price Adjustment request in writing to the County Purchasing Agent.
  - tie any price change clause to an industry-wide or otherwise nationally recognized index, or some other form of verifiable document. Such written request must be accompanied by a certified copy of the supplier's advisory or notification to the Vendor of the price changes.
  - put the Purchasing Agent on the mailing lists for such publications so that the Purchasing Agent can monitor said changes. Such membership shall be at no cost to the County.
  - notify the County at the time when the Vendor's costs for items, supplies, and or services reduce due to stabilization in the market at which time prices for items on this contract shall be reduced accordingly. Failure by the Vendor to notify the County of a decrease in costs for items and/or supplies for which the Vendor was granted a price adjustment, may result in immediate termination of this contract and the County shall not be obligated to pay the Vendor the difference between the contract price and the price adjustment.
- Price adjustment reviews may only be requested by the Vendor on a quarterly basis; however, the County may at its own discretion, conduct temporary price adjustment reviews at any time.
- The County Purchasing Agent retains the right to determine whether or not such proposed price changes are in the best interest of the County.
- The County may only grant a price increase if the evidence presented is deemed reliable.
- No price escalation will be authorized in excess of the amount of the increase referred to in the supplier's notice.
- The total increase in contract price shall not exceed twenty-five percent (25%) of the original contract price during the contract term.
- Should the County allow a price increase, the approved price change shall be honored for all orders received by the vendor or contractor after the effective date of such price change. Approved price changes are not applicable to orders already issued and in process at time of price change.
- Price increases are only valid for the quarter in which they are requested and approved.

- Prices shall return to the original contract price at the beginning of the following quarter unless a Vendor notifies the County in writing within ten (10) days of expiration of the quarter in which the price increase is in effect, that it desires to have the price increase continue or that the Vendor is requesting a different price increase for the following quarter. Such request must be supplemented with sufficient justification to demonstrate that the price increase remains necessary. The County Purchasing Department shall have sole discretion whether to grant the price increase extension.
- The County Purchasing Agent and/or the County Auditor reserve the right to audit and/or examine any pertinent books, documents, papers, records or invoices relating directly to the contract transaction in question after reasonable notice and during normal business hours.
- The County too, shall have discretion to unilaterally reduce, eliminate or extend a price adjustment to the Vendor at any time upon written notice from the County to the Vendor demonstrating justification for such reduction, elimination or extension of the price adjustment.

#### 4.25. MATERIAL SAFETY DATA SHEETS

Under the "Hazardous Communication Act", commonly known as the "Texas Right to Know Act", an Offeror must provide to the County with each delivery, safety data sheets which are applicable to hazardous substances defined in the Act. Failure of the Offeror to furnish the required documentation will be cause to reject any response applying thereto.

#### 4.26. MINIMUM STANDARDS FOR RESPONSIBLE PROSPECTIVE RESPONDENTS

With their submitted response, the Offeror must affirmatively demonstrate their responsibility as listed on **Appendix "A"**. A prospective respondent, by submitting a response, represents to County that it meets the requirements listed.

#### 4.27. NAME BRANDS

Specifications may reference name brands and model numbers. It is not the intent of Hidalgo County to restrict or preclude competition in any way, but to establish a desired quality level of merchandise or to meet a pre-established standard due to like existing items. Offerors may offer items of equal stature and the burden of proof of such stature rests with Offerors. Hidalgo County shall act as sole judge in determining equality and acceptability of products offered.

#### 4.28. NEW MILLENNIUM COMPLIANCE

All products and/or services furnished as part of this contract must be compliant for the present year and forward. This applies to all computers including hardware and software as well as all other commodities with date sensitive embedded chips.

#### 4.29. PAYMENT UNDER CONTRACT

If the contract is for \$50,000 or less, no money will be paid to the contractor until completion and acceptance of the work or the fulfillment of the purchase obligation to the County, and, if applicable, the receipt by County of satisfactory evidence that all subcontractors and material men have been paid.

#### 4.30. PERFORMANCE ENFORCEMENT

Hidalgo County reserves the right to enforce performance of any contract, agreement, supplemental agreement, as amended, or participation in the professional services pool, in any manner prescribed by law or deemed to be in the best interest of the County. Hidalgo County reserves the right to terminate the contract awarded hereunder in any manner prescribed by law or deemed to be in the best interest of the County immediately in the event of breach or default by a successful respondent, including, but not limited to failure to maintain qualifications, meet schedules, pay any required fees or taxes, or otherwise failing to perform in accordance with the requirements of this procurement packet.

#### 4.31. POST-AWARD DELIVERY INSTRUCTIONS

Title and Risk of Loss of goods shall not pass to Hidalgo County until Hidalgo County actually receives and takes possession of the goods at the point or points of delivery. Receiving times may vary with the user department. Generally, deliveries may be made between 8:30 a.m. and 4:00 p.m., Monday through Friday, except on County approved holidays. The Offeror is advised to consult the user department for instructions, and be given at least seventy-two (72) hours prior notice of delivery, if applicable, before delivery will be accepted. The place of delivery shall be identified in the Requirements/Specifications attached hereto as **Appendix "A"** of this procurement packet and/or on the Purchase Order as a "Deliver To:" address.

#### 4.32. POST-AWARD INVOICES AND PAYMENTS

Offerors shall submit an original, itemized invoice on company letterhead with their company name and address, detailing the deliverable(s) of goods and/or services provided, the respective price, product code, item number, quantity, etc. per line item, the name of receiving/requesting department or elected office, the delivery address, the awarded vendor's contract number, and issued purchase order number. Any invoice, which cannot be verified by the contract price and/or is otherwise incorrect, will be returned to the Offeror for correction. Under term contracts, when multiple deliveries and/or services are required, the Offeror may invoice following each delivery and the County will payon invoice. Contracts providing for a monthly charge will be billed and paid on a monthly basis only. All payments are subject to compliance with the Texas Prompt Payment Act.

Deliverables or services will be considered complete only upon written acceptance by Hidalgo County. Nocharges may be billed to Hidalgo County unless such costs are explicitly included in the agreement or contract. For billing and payment questions please contact the Hidalgo County Auditor's Office, 2808 S. Business Hwy. 281, Edinburg, Texas 78539, (956) 318-2511.

#### 4.33. PROCEDURES FOR VENDOR PROTEST

Any potential Offeror has the right to protest a solicitation packet or contract award. Details for these procedures can be found on our County website: <https://www.hidalgocounty.us/143/Purchasing-Department>. The Vendor also understands that an awarded contract may immediately become void if the County determines that a lack of compliance with applicable policies and/or statutes has occurred at any time, whether in the procurement process, or after award.

#### 4.34. PROCUREMENT PACKET FORM COMPLETION

When submitting procurement packet response, Respondents must follow the procedures and requirements provided within the procurement packet, including, but not limited to those found in the Invitation Letter, Submission Details and Procurement Overview. An authorized representative of the Offeror should complete all necessary response documentation. **Failure to complete required forms or provide required information and/or to follow procedures and/or requirements may be cause to reject the entire response.**

#### 4.35. PROCUREMENT PACKET SUBMISSION

Offeror must comply with the following procurement packet submission procedures.

**4.35.1** Offeror must submit all completed responses in accordance with the provisions, procedures and requirements provided within the procurement packet, including, but not limited to those found in the Invitation Letter, Submission Details and Procurement Overview by the date and time indicated therein. **Failure to follow packet submission requirements may be cause to reject the entire response. Late submissions will not be accepted for any reason.**

**4.35.2 Supplemental Materials.** Offerors are responsible for including all pertinent product data in the submitted response to this procurement packet. Literature, brochures, data sheets, specification information, completed forms requested as part of the procurement packet and any other facts which may affect the evaluation and subsequent contract award should be included. Materials such as legal documents and contractual agreements, which the Offeror wishes to include as a condition of the submission, must also be in the submitted response. Failure to include all necessary and proper supplemental materials may be cause to reject the entire response.

#### 4.36. PROOF OF BUSINESS

Offeror must be in business under its current name and in its current form (e.g., proprietorship, Chapter S Corporation). Information to be included as part of the Vendor Application, **Appendix “E”**.

#### 4.37. PURCHASE ORDER AND DELIVERY

The successful Offeror shall not deliver products or provide services without a Hidalgo County Purchase Order, signed by the Hidalgo County Purchasing Director, or an authorized agent of the Hidalgo County Purchasing Department. When applicable, the fastest, most reasonable delivery time shall be indicated by the Offeror in the proper place on **Appendix “B”**. Any special information concerning delivery should also be included, on a separate sheet, if necessary. All items shall be shipped **F.O.B. INSIDE DELIVERY** unless otherwise stated in the specifications. This shall be understood to include bringing merchandise to the appropriate room or place designated by the user department. Every tender or delivery of goods must fully comply with all provisions of these requirements and the specifications including time, delivery and quality. Nonconformance shall constitute a breach which must be rectified prior to expiration of the time for performance. Failure to rectify within the performance period will be considered cause to reject future deliveries and cancellation of the contract by Hidalgo County, without prejudice to other remedies provided by law. **Where delivery times are critical, Hidalgo County reserves the right to award accordingly.**

Goods and/or Services must not be provided and **invoices will not be paid** without a purchase order signed by the Hidalgo County Purchasing Director.

#### 4.38. QUALIFICATIONS OF OFFEROR

Offeror's failure to qualify or maintain qualifications throughout the term of this agreement shall release Hidalgo County from all obligations to the Offeror with regard to the services. In such an event, Hidalgo County may elect to engage another qualified firm or reject all submissions and re-advertise.

#### 4.39. RECYCLED MATERIALS

Hidalgo County encourages the use of products made of recycled materials and shall give preference in purchasing to products made of recycled materials if the products meet applicable specifications as to quantity and quality. Hidalgo County will be the sole judge in determining product preference application.

#### 4.40. REFERENCES

If applicable, Offeror must provide a total of four (4) references in each response to a solicitation requested by Hidalgo County. **One of the four references listed should be of a project that was canceled. If Offeror has not had a project canceled, then please indicate so.** Offeror may provide this in form of Reference Letters from other individual(s)/entities or local government entities for whom the Offeror has provided similar services in the past twenty-four (24) months as demonstration of their prior experience, or if Offeror prefers, may utilize the Reference Form **Appendix "M"**. Letters or reference sheet must include the following information:

- Organization/Client Name/Government Entity (Include population of any local governmental entity – some procurements may require a specific population).
- Name of Contact Person
- Contact Telephone, Address, and Email
- Name of Project
- Scope of Work
- Contract Period
- Budget Project Amount; Actual Project Amount
- Expected project timeframe; actual project timeframe
- Include contact information for one (1) client that services have been canceled, and a description of why the project was canceled. If Offeror has not had a project canceled, then please indicate so.

#### 4.41. SCANNED OR RE-TYPED RESPONSE

If in its response, Offeror either electronically scans, re-types, or in some way reproduces the County's published procurement packet, then in the event of any conflict between the terms and provisions of the County's published procurement packet, or any portion thereof, and the terms and provisions of the response made by the Offeror, the County's procurement packet **as published** shall control. Furthermore, if an alteration of any kind to the County's published procurement packet is only discovered after the contract is executed and is or is not being performed; the contract is subject to immediate cancellation.

Regardless of how an Offeror requested or received a copy of this procurement packet to prepare a response, **the response must be submitted according to the instructions contained within this procurement packet.**

#### 4.42. SEVERABILITY

If any section, subsection, paragraph, sentence, clause, phrase, or word of these requirements or the specifications shall be held invalid, such holding shall not affect the remaining portions of these requirements and the specifications and it is hereby declared that such remaining portions would have been included in these requirements and the specifications as though the invalid portion had been omitted.

#### 4.43. SILENCE OF SPECIFICATIONS

The apparent silence of specifications as to any detail, or the apparent omission from it of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practice is to prevail and that only material and workmanship of the finest quality are to be used. All interpretations of specifications shall be made on the basis of this statement. The items furnished under this contract shall be new, unused of the latest product in production to commercial trade and shall be of the highest quality as to materials used and workmanship. Manufacturer furnishing these items shall be experienced in design and construction of such items and shall be an established supplier of the item proposed.

#### 4.44. SUBCONTRACTING

Vendor may not subcontract services to another firm without prior written request detailing goods and/or services that are to be subcontracted, and approval of said written request by Hidalgo County Commissioners Court, or applicable governing body.

#### 4.45. TAXES

Hidalgo County is exempt from all federal excise, state, and local taxes unless otherwise stated in this document. Hidalgo County claims exemption from all sales and/or use taxes under Texas Tax Code §151.309, as amended. Offerors are not to include tax in any cost figures (including in any supplemental project specific contracts applicable to pools). If it is determined that tax was included in the cost figure it will not be included in the tabulation of any supplemental project specific awards. Texas Limited Sales Tax Exemption Certificates will be furnished upon written request to the Hidalgo County Purchasing Department, and signed by the Agent, or authorized Purchasing Department representative.

#### 4.46. TERM OF CONTRACTS

If the contract is intended to cover a specific time period, the term will be specified in the **Procurement Overview**. Awarded contract will be in effect until (a) the term expires, or (b) participation is terminated by County with thirty (30) days written notice prior to cancellation with or without cause. Any supplemental project-specific contract award to a successful respondent 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 the County with thirty (30) days written notice prior to cancellation with or without cause, unless otherwise stated in the executed agreement.

#### 4.47. TERMINATION

Hidalgo County reserves the right to terminate the contract for default if Offeror breaches any of the terms therein, including warranties of Offeror or if the Offeror becomes insolvent or commits acts of bankruptcy. Such right of termination is in addition to and not in lieu of any other remedies which

Hidalgo County may have in law or equity. Default may be construed as, but not limited to, failure to deliver the proper goods and/or services within the proper amount of time, and/or to properly perform any and all services required to Hidalgo County's satisfaction and/or to meet all other obligations and requirements. Hidalgo County may terminate the contract without cause upon thirty (30) days written notice, unless otherwise stated in the executed agreement.

#### 4.48. TERMINATION FOR HEALTH AND SAFETY VIOLATIONS

Hidalgo County has the option to terminate this contract immediately without prior notice if Offeror fails to perform any of its obligations in this contract if the failure (a) created a potential threat to health or safety or (b) violated a law, ordinance, or regulation designed to protect health or safety.

#### 4.49. USAGE REPORTS

Hidalgo County reserves the right to request, and receive at no additional cost during the yearly contract period, a usage report detailing the services furnished to date under an agreement resulting from this procurement packet. The reports must be furnished no later than five (5) business days after written request and itemize all purchases to date by Hidalgo County department, description of each service purchased, quantity of each service purchased, per unit cost and total amount of all services purchased.

#### 4.50. WAIVER OF SUBROGATION

Offeror and Offeror's insurance carrier waive any and all rights whatsoever with regard to subrogation against Hidalgo County as an indirect party to any suit arising out of personal or property damages resulting from Offeror's performance under any award resulting from award from this procurement packet.

#### 4.51. WARRANTIES

Offerors shall furnish all data pertinent to warranties or guarantees which may apply to items in the response to this procurement packet. Offeror may not limit or exclude any implied warranties. Further, Offeror warrants that product sold to the County shall conform to the standards established by the U.S. Department of Labor under the Occupational Safety and Health Act of 1970. In the event product does not conform to OSHA Standards, where applicable, Hidalgo County may return the product for correction or replacement at the Offeror's expense. If Offeror fails to make the appropriate correction within a reasonable time, Hidalgo County may correct at the Offeror's expense.

#### 4.52. CIVIL WORKS, CONSTRUCTION & PUBLIC WORKS PROJECTS

Provisions of Tex. Govt. Code Ch. 2269 as amended by HB 2581 of the 87th Texas Legislature applicable to Civil Works and Construction Projects are hereby incorporated. Provisions of Texas Local Govt. Code Ch. 271, subchapter B applicable to competitive bidding on certain public works projects are hereby incorporated.

## **5. APPENDIX A - REQUIREMENTS/SPECIFICATIONS**

### **5.1. PROJECT REQUIREMENTS**

Respondents can find the Requirements, Specifications under [#ATTACHMENTS](#)

## 6. APPENDIX B - EVALUATION CRITERIA

No.	Evaluation Criteria	Scoring Method	Weight (Points)
1.	<p><b>Firm Overview</b></p> <ul style="list-style-type: none"> <li>• Historical Background</li> <li>• Number and Locations of Offices</li> <li>• Legal form: LLC, sole proprietorship, partnership, etc...</li> <li>• Length of time in existence</li> <li>• Annual Agency Revenues</li> <li>• Number of Staff Members</li> <li>• Days and Hours of Operation</li> <li>• Disclose any conditions: bankruptcy, any financial problems, pending litigation, expected office closures, impending merger.</li> </ul>	Points Based	<p>5  <i>(5% of Total)</i></p>

2.	<p><b>Firm Experience</b></p> <ul style="list-style-type: none"> <li>• List all municipalities and/or counties to which your firm has served as served as a <b>medical health plan</b> agent and the dates of service, and carrier.</li> <li>• List all municipalities and/or counties to which your firm has served an agent for <b>supplemental insurance services</b> and the dates of service</li> <li>• 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.</li> <li>• Identify all lost or terminated <b>public</b> accounts in the last three years, describe the services your firm provided and state the reason for the end of the working relationship.</li> <li>• List of <b>insurance carriers</b> 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.</li> <li>• <b>Hidalgo County does not pay commissions.</b> Describe your firm's plans to be compensated (i.e. retainers, fees, overrides or commissions) and how these amounts are calculated, including comparison to industry standard.</li> <li>• Disclose any existing or potential conflicts of interest between the scope of work required by Hidalgo County and your firm's other business activities.</li> <li>• Furnish certificates of insurance showing the types and amounts of insurance carried by your firm.</li> </ul>	Points Based	30 <i>(30% of Total)</i>
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<p>3.</p>	<p><b>Firm Qualifications</b></p> <ul style="list-style-type: none"> <li>• Licensed to provide insurance services in Texas.</li> <li>• List names of all staff who would be assigned and readily available to service Hidalgo County and describe their roles in servicing this account.</li> <li>• List details of this staff's specific insurance experience as it relates to Hidalgo County.</li> <li>• Outline your ability to provide expertise and experience in the area of health benefit plan analysis.</li> <li>• Detail your ability to provide advice on health care cost containment.</li> <li>• Describe the scope of your services involved in resolving disputed claims, problems, etc. between the insured and the insurance carrier.</li> <li>• Describe the scope of your services involved in open enrollment.</li> <li>• Give examples of your work with other clients, specifically in the municipal markets.</li> <li>• Describe the list of services you will be providing to Hidalgo County which will be included in your compensation.</li> </ul>	<p>Points Based</p>	<p>30 <i>(30% of Total)</i></p>
<p>4.</p>	<p><b>Customer References</b></p> <ul style="list-style-type: none"> <li>• Customer 1: Current</li> <li>• Customer 2: Current</li> <li>• Customer 3: Past</li> </ul>	<p>Points Based</p>	<p>10 <i>(10% of Total)</i></p>

5.	<b>Implementation Plan</b> <ul style="list-style-type: none"><li>• Efficiency and comprehensiveness of methods to be used in performing the Consulting Services.</li><li>• A summary of work plan, approach, tasks and outline of information that will be required from Hidalgo County.</li><li>• Comprehensiveness of benefit offerings and quantitative analysis of benefits versus cost.</li></ul>	Points Based	25 <i>(25% of Total)</i>
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## 7. ELECTRONIC SUBMISSION DOCUMENTS

- Firms must complete the following sections.
- If the submission is electronic, please proceed with completing all sections. Required documentation will need to be downloaded, completed, and uploaded.
- If the submission is a hard copy, please print the entire packet and complete all sections manually. Required documentation will need to be printed, completed, and included as part of the submission.
- **Failure to submit a complete response may result in the rejection of the response as non-conforming.**

### 7.1. I confirm, that I will be submitting my response electronically.\*

Please confirm and proceed with the electronic submission requirements.

Please confirm

\*Response required

### 7.2. LEGAL NOTICE DECLARATION

#### 7.2.1. LEGAL NOTICE DECLARATION\*

**TO:** Ignacio Amezcua, MBA, CTCM, CTCD, Purchasing Director

**ATTN:** Cassandra Carr, Contract Specialist II

Hidalgo County Administration Building/Purchasing Department

2802 S. Business Hwy. 281

Edinburg, Texas 78539

**RE:** 23-0342-02-14-08 - Consulting Services For Self-Funded Health Plan

By providing a response to this solicitation, we acknowledge receipt of all of the pages of in this procurement packet. We understand that Hidalgo County reserves the right to reject any or all submissions, and further reserves the right to design the evaluation criteria to be used in selecting the lowest and best qualification.

We acknowledge that we have examined this procurement packet in its entirety, and are familiar with the conditions to be met. In accordance with the Specifications, and subject to all laws and regulations of the United States, State of Texas, and local laws, we propose and commit to furnish all labor, equipment, material, software, and services as set forth in the documents hereinbefore mentioned. Any purchase order or contract resulting from this process shall be considered null and void if the successful respondent fails to comply with any federal, state or local laws.

We acknowledge that we are providing the required certifications, attestations, verifications and/or acknowledgments as referenced within this procurement packet. We further acknowledge that any and all specifications, provisions, and attachments of this response are incorporated into and made a part of any resulting agreement.

We agree that this response shall be good, and may not be withdrawn for a period of ninety (90) calendar days after the scheduled bid opening time and date for receiving the requested solicitation, as contained in the Specifications.

Lastly, we understand that any questions regarding compliance should be directed to our firm's legal counsel. We acknowledge that the individual authorized to bind the company is signing this Acknowledgement Form. By signing this Acknowledgement Form we understand we are providing written verification and certification of the aforementioned, and the County cannot execute a contract for goods or services without this declaration.

Please confirm

\*Response required

### 7.3. APPENDIX B

#### 7.3.1. *Evaluation Criteria\**

I confirm that as part of my submission, I will provide the proposal as required under "*Appendix B - Evaluation*" of this project.

Please confirm

\*Response required

### 7.4. APPENDIX C

#### 7.4.1. *PROOF OF INSURANCE\**

##### **Insurance Requirements**

##### **Applicable to the Acquisition of Goods and/or Services**

##### **(Other than Professional Services)**

The Bidder awarded the contract shall furnish proof of insurance, which will also include any subcontractor that is subcontracted by the bidder in at least the following limits, to be in place prior to providing any services under this Contract and to continue at all times in force in effect during the term of this Contract and any extension hereof:

1. **Comprehensive General Liability insurance** policy with limits of not less than Five Hundred Thousand Dollar (\$500,000.00) providing additional coverage to all underlying liabilities of County. Policy shall cover, but not be limited to, Bidder's activities in providing the Services for County; all persons, vehicles, equipment connected with providing Services; and theft or loss of Bidder's property.

2. **Automobile liability insurance** policy, covering all owned, non-owned or hired/leased automobiles, with limits of at least Three Hundred Thousand Dollars (\$300,000.00) per person and Five Hundred Thousand Dollars (\$500,000.00) per occurrence. Coverage should include injury to or death of persons and property damage claims with limits up to five Hundred Thousand (\$500,000.00) arising out of the services provided to County hereunder.

3. **Uninsured/Underinsured motorist coverage** in an amount equal to the auto liability limits set forth immediately above;

4. **Workers Compensation Insurance:** Workers Compensation insurance in amounts established by Texas law, unless the Bidder is specifically exempted from the Texas Workers Compensation Act, Texas

Labor Code Chapter 401, et. seq. Workers Compensation policies must include other States Endorsement to include TEXAS if the business is domiciled outside the State of Texas.

- Bidder shall obtain and maintain any and all other insurances which may be necessary in providing the good/service applicable to this procurement or are otherwise required by law.
- Any and all insurance policies shall be in amounts prescribed by law or otherwise specified by the County, but in no event less than the minimum amounts prescribed by law.

**Additional Insurance Requirements:**

- A. Bidder shall furnish to County certificate(s) of insurance, and all renewals throughout the duration of the Project, issued by the insurer that such insurance is in full force and effect.
- B. Certificates of insurance shall be submitted to County for approval prior to any services being performed by Bidder.
- C. **Hidalgo County will only accept certificates of insurance on an Acord form (below).**
- D. For each policy, except Workers' Compensation, Bidder shall name the County as an additional insured.
- E. Each policy of insurance required hereunder shall extend for a period equivalent to, or longer than the term of the Contract, and any insurer hereunder shall be required to give at least thirty (30) days written notice to the County prior to the cancellation of any such coverage on the termination date, or otherwise.
- F. This Contract shall be automatically suspended upon the cancellation, or other termination, of any required policy of insurance hereunder, and such suspension shall continue until evidence of adequate replacement coverage is provided to County. If replacement coverage is not provided within thirty (30) days following suspension of the Contract, this Contract shall automatically terminate.
- G. All insurance policies will be endorsed to provide a waiver of subrogation in favor of the County.
- H. County reserves the right to review the insurance requirements of this section during the effective period of the contract and to require adjustment of insurance coverage and their limits when deemed necessary and prudent by County based upon changes in statutory law, court decisions, or the claims history of the industry as well as the Bidder.
- I. Insurance policies shall be obtained at Bidder's sole expense. County does not maintain and will not obtain insurance of any type to protect Bidder against loss, damage or injury that may in any way result from Bidders performance of the services.
- J. In no event shall the County be liable for any loss, damage to or destruction of any property belonging to the Bidder.
- K. Bidder is responsible for ensuring all required insurance policies are valid for the duration of the contract.

- L. All insurance policies are to be issued by an insurance company authorized to do business in the State of Texas and acceptable to County.
- M. Bidder shall make any other insurance documentation available to County upon request.

<b>ACORD</b>		<b>CERTIFICATE OF LIABILITY INSURANCE</b>		DATE (MM/DD/YYYY)		
THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.						
IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).						
PRODUCER		CONTACT NAME				
		PHONE (A/C No. Ext)		FAX (A/C No.)		
		E-MAIL				
		ADDRESS				
		INSURER(S) AFFORDING COVERAGE		NAIC #		
INSURED		INSURER A :				
		INSURER B :				
		INSURER C :				
		INSURER D :				
		INSURER E :				
		INSURER F :				
COVERAGES		CERTIFICATE NUMBER:		REVISION NUMBER:		
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.						
TYPE	TYPE OF INSURANCE	ADDL	SUBR	POLICY EFF	POLICY	LIMITS
LTR		INSR	WVR	(MM/DD/YYYY)	(MM/DD/YY)	
	GENERAL LIABILITY					EACH OCCURRENCE \$
	COMMERCIAL GENERAL LIABILITY					DAMAGE TO RENTED PREMISES (Ea occurrence) \$
	CLAIMS-MADE <input type="checkbox"/> OCCUR <input type="checkbox"/>					MED EXP (Any one person) \$
						PERSONAL & ADV INJURY \$
						GENERAL AGGREGATE \$
	GENL AGGREGATE LIMIT APPLIES PER					PRODUCTS - COMP/OP AGG \$
	POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/>					\$
	AUTOMOBILE LIABILITY					COMBINED SINGLE LIMIT (Ea accident) \$
	ANY AUTO					BODILY INJURY (Per person) \$
	ALL OWNED AUTOS					BODILY INJURY (Per accident) \$
	HIRED AUTOS					PROPERTY DAMAGE (Per accident) \$
	SCHEDULED AUTOS					\$
	NON-OWNED AUTOS					
	UMBRELLA LIAB					EACH OCCURRENCE \$
	EXCESS LIAB					AGGREGATE \$
	OCCUR <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/>					\$
	DED <input type="checkbox"/> RETENTION \$					\$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY					WC STATU-TORY LIMITS
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)					OTH-ER
	If yes, describe under DESCRIPTION OF OPERATIONS below					E.L. EACH ACCIDENT \$
						E.L. DISEASE - EA EMPLOYEE \$
						E.L. DISEASE - POLICY LIMIT \$
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)						
CERTIFICATE HOLDER				CANCELLATION		
HIDALGO COUNTY ATTN: PURCHASING DEPARTMENT 2812 S, HIGHWAY BUS. 281 EDINBURG, TEXAS 78539				SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.		
				AUTHORIZED REPRESENTATIVE		

Please provide or upload your Certificate of Liability Insurance depending on your method of submission.

\*Response required

**7.4.2. INSURANCE REQUIREMENT ACKNOWLEDGMENT\***

I, an authorized representative for of my company, the company submitting this response, hereby acknowledge receipt of the County's required insurance limits. Said requirements:

- will be acquired within 10 working days after notification from Purchasing Department of award of the project by the Hidalgo County Commissioners' Court;
- will acquire additional amount needed to meet the County's requirements within 10 working days after notification from Purchasing Department of award of the project by the Hidalgo County Commissioners' Court; currently carry the following:
  - Professional Liability (Errors & Omissions)
  - Automobile Liability
  - General Liability
- have already been met, see attached copy of certificate of insurance.

**Notice to Bidder:**

A certificate of insurance for the required insurance limits shall be provided to the Purchasing Department in order to qualify for award of the project and to execute a contract between your Company and the County.

Failure to provide Certificates of Insurance to the Purchasing Department's Contract Managers will cause the award of the project to be rescinded and then re-awarded to next qualified vendor. Certificates of Insurance will be monitored and verified on a **quarterly basis** to ensure coverage policy is in place. It is the Company's obligation to maintain the appropriate insurance coverage throughout the term of the contract.

Please confirm

\*Response required

**7.4.3. PROJECT REQUIREMENTS ACKNOWLEDGMENT\***

This is to certify that I, an authorized representative of my company, possess all of the **APPLICABLE**:

1. Licenses
2. Bonds
3. Certificates
4. Permits
5. Other

necessary to carry out the required project. Furthermore, **I am providing copies of the required documentation** (upload copies here) so that, if my company is awarded this project, I may be eligible to enter into a contract with Hidalgo County and proceed to complete the project in a timely manner.

\* Any licenses, bonds, certificates, permits, etc. which are required must be presented as part of the bid packet in order to expedite the bid evaluation process. Failure to provide said documentation will result in the disqualification of your bid or response.

Please confirm

\*Response required

## 7.5. APPENDIX D

### 7.5.1. CONFLICT OF INTEREST QUESTIONNAIRE\*

Please download the below documents, complete, and upload.

- [Appendix D - COI Questionna...](#)

\*Response required

## 7.6. APPENDIX E

### 7.6.1. VENDOR ACKNOWLEDGMENT\*

**Please read and acknowledge the required steps necessary to do business with Hidalgo County:**

#### **Step 1:**

**OpenGov** will now serve as the primary source for all Hidalgo County solicitation postings, electronic bidding, and contract management. Any reliance on other information or sources not directly downloaded from OpenGov may result in a submission that is not in compliance.

**Link can be found below:**

-<https://procurement.opengov.com/portal/co-hidalgo-tx>

#### **Step 2:**

**ConsiderMe (Vendor Enrollment Solution)** is an innovative tool that facilitates the needs of Hidalgo County to secure qualified vendors. Local, state, and national vendors can apply using the vendor registration form in the link below.

-<https://www.hidalgocounty.us/2912/Potential-Vendors-ConsiderMe>

\*The Vendor Registration Form does not guarantee a contract or agreement, however, it does guarantee your service or goods will be added to the list of potential vendors available to Hidalgo County.

Please confirm

\*Response required

### 7.6.2. HUB DECLARATION\*

Please download the below documents, complete, and upload.

- [Appendix E - Vendor Enrollm...](#)

\*Response required

## 7.7. APPENDIX F

### 7.7.1. *CERTIFICATION REGARDING DEBARMENT\**

Please download the below documents, complete, and upload.

- [Appendix F - Certification ...](#)

\*Response required

### 7.7.2. *SAM.GOV REGISTRATION\**

Please enter your company's Legal Name and/or dba Name

\*Response required

### 7.7.3. *FORM 1295\**

Please provide a Form 1295.

- <https://www.ethics.state.tx.us/filinginfo/QuickFileAReport.php>
- Reference Consulting Services For Self-Funded Health Plan23-0342-02-14-08on section 3 of the form.
- Be sure to complete section 6 of the form, in order to be valid.

\*Response required

## 7.8. APPENDIX G

### 7.8.1. *Title VI Appendices - (Please confirm that you have read, understood and agree)\**

#### APPENDIX A

#### THE TITLE VI CONTRACTOR ASSURANCES

During the performance of this contract, the contractor, for itself, its assignees and successors in interest (hereinafter referred to as the "contractor") agrees as follows:

- 1. Compliance with Regulations:** The contractor will comply with the Regulations relative to nondiscrimination in federally assisted programs of the United States Department of Transportation Federal Highway Administration, as they may be amended from time to time, which are herein incorporated by reference and made a part of this contract.
- 2. Nondiscrimination:** The contractor, with regard to the work performed by it during the contract, will not discriminate on the grounds of race, color, national origin, sex, age, disability, income or Limited English Proficiency in the selection and retention of subcontractors, including procurements of materials and leases of equipment. The contractor will not participate directly or indirectly in the discrimination prohibited by the Acts and Regulations, including employment practices when the contract covers any activity, project, or program set forth in Appendix B of 49 CFR Part 21.
- 3. Solicitations for Subcontracts, Including Procurements of Materials and Equipment:** In all solicitations, either by bidding, or negotiation made by the contractor for work to be performed under a subcontract, including procurements of materials, or leases of equipment, each potential subcontractor or

supplier will be notified by the contractor of the contractor's obligations under this contract and Acts and the Regulations relative to Non-discrimination on the grounds of race, color, national origin, sex, age, or disability.

**4. Information and Reports:** The contractor will provide all information and reports required by the Acts, the Regulations, and directives issued pursuant thereto and will permit access to its books, records, accounts, other sources of information, and its facilities as may be determined by the Recipient or the federal funding agency (FHWA or FTA) to be pertinent to ascertain compliance with such Acts, Regulations, and instructions. Where any information required of a contractor is in the exclusive possession of another who fails or refuses to furnish this information, the contractor shall so certify to the Recipient or the Federal Funding Agency, as appropriate, and will set forth what efforts it has made to obtain the information.

**5. Sanctions for Non-compliance:** In the event of the contractor's non-compliance with the Nondiscrimination provisions of this contract, the Recipient will impose such contract sanctions as it or the Federal Funding Agency may determine to be appropriate, including, but not limited to:

- a. withholding contract payments to the contractor under the contract until the contractor complies; and/or
- b. cancelling, terminating, or suspending a contract, in whole or in part.

**6. Incorporation of Provisions:** The contractor will include the provisions of paragraphs one through six in every subcontract, including procurements of materials and leases of equipment, unless exempt by the Acts, the Regulations and directives issued pursuant thereto. The contractor will take action with respect to any subcontract or procurement as the Recipient or the Federal Funding Agency may direct as a means of enforcing such provisions including sanctions for noncompliance. Provided, that if the contractor becomes involved in, or is threatened with, litigation by a subcontractor, or supplier because of such direction, the contractor may request the Recipient to enter into any litigation to protect the interests of the Recipient. In addition, the contractor may request the United States to enter into the litigation to protect the interests of the United States.

## **APPENDIX B**

### **CLAUSES FOR DEEDS TRANSFERRING UNITED STATES PROPERTY**

The following clauses will be included in deeds effecting or recording the transfer of real property, structures, or improvements thereon, or granting interest therein from the United States pursuant to the provisions of Assurance 4:

NOW, THEREFORE, the U.S. Department of Transportation as authorized by law and upon the condition that the **COUNTY OF HIDALGO** will accept title to the lands and maintain the project constructed thereon in accordance with (Name of Appropriate Legislative Authority), the Regulations for the Administration of (Naming of Appropriate Program), and the policies and procedures prescribed by the (Federal Highway Administration) of the U.S. Department of Transportation in accordance and in compliance with all requirements imposed by Title 49, Code of Federal Regulations, U.S. Department of Transportation, Subtitle A, Office of the Secretary, Part 21, Non-discrimination in Federally-assisted programs of the U.S Department of Transportation pertaining to and effectuating the provisions of Title VI of the Civil Rights Act of 1964 (78 Stat. 252; 42 U.S.C. 2000d to 2000d-4), does hereby remise, release, quitclaim and convey unto the **COUNTY OF HIDALGO** all the right, title and interest of the

U.S. Department of Transportation in and to said lands described in Exhibit A attached hereto and made a part hereof.

(HABENDUM CLAUSE)

TO HAVE AND TO HOLD said lands and interests therein unto **COUNTY OF HIDALGO** and its successors forever, subject, however, to the covenants, conditions, restrictions and reservations herein contained as follows, which will remain in effect for the period during which the real property or structures are used for a purpose for which Federal financial assistance is extended or for another purpose involving the provision of similar services or benefits and will be binding on the **COUNTY OF HIDALGO**, its successors and assigns.

The **COUNTY OF HIDALGO**, in consideration of the conveyance of said lands and interests in lands, does hereby covenant and agree as a covenant running with the land for itself, its successors and assigns, that (1) no person will on the grounds of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination with regard to any facility located wholly or in part on, over, or under such lands hereby conveyed [, ] [and] \* (2) that the **COUNTY OF HIDALGO** will use the lands and interests in lands and interests in lands so conveyed, in compliance with all requirements imposed by or pursuant to Title 49, Code of Federal Regulations, U.S. Department of Transportation, Subtitle A, Office of the Secretary, Part 21, Nondiscrimination in Federally-assisted programs of the U.S. Department of Transportation, Effectuation of Title VI of the Civil Rights Act of 1964, and as said Regulations and Acts may be amended[, and (3) that in the event of breach of any of the above-mentioned non-discrimination conditions, the Department will have a right to enter or re-enter said lands and facilities on said land, and that above described land and facilities will thereon revert to and vest in and become the absolute property of the U.S. Department of Transportation and its assigns as such interest existed prior to this instruction]. \*

(\*Reverter clause and related language to be used only when it is determined that such a clause is necessary in order to make clear the purpose of Title VI.)

### APPENDIX C

#### CLAUSES FOR TRANSFER OF REAL PROPERTY ACQUIRED OR IMPROVED UNDER THE ACTIVITY, FACILITY, OR PROGRAM

The following clauses will be included in deeds, licenses, leases, permits, or similar instruments entered into by the **COUNTY OF HIDALGO** pursuant to the provisions of Assurance 7(a):

A. The (grantee, lessee, permittee, etc. as appropriate) for himself/herself, his/her heirs, personal representatives, successors in interest, and assigns, as a part of the consideration hereof, does hereby covenant and agree [in the case of deeds and leases add "as a covenant running with the land"] that:

1. In the event facilities are constructed, maintained, or otherwise operated on the property described in this (deed, license, lease, permit, etc.) for a purpose for which a U.S. Department of Transportation activity, facility, or program is extended or for another purpose involving the provision of similar services or benefits, the (grantee, licensee, lessee, permittee, etc.) will maintain and operate such facilities and services in compliance with all requirements imposed by the Acts and Regulations (as may be amended) such that no person on the grounds of race, color, or national origin, will be excluded from participation in, denied the benefits of, or be otherwise subjected to discrimination in the use of said facilities.

B. With respect to licenses, leases, permits, etc., in the event of breach of any of the above Nondiscrimination covenants, **COUNTY OF HIDALGO** will have the right to terminate the (lease, license, permit, etc.) and to enter, re-enter, and repossess said lands and facilities thereon, and hold the same as if the (lease, license, permit, etc.) had never been made or issued.\*

C. With respect to a deed, in the event of breach of any of the above Non-discrimination covenants, the **COUNTY OF HIDALGO** will have the right to enter or re-enter the lands and facilities thereon, and the above described lands and facilities will there upon revert to and vest in and become the absolute property of the **COUNTY OF HIDALGO** and its assigns. \*

(\*Reverter clause and related language to be used only when it is determined that such a clause is necessary to make clear the purpose of Title VI.

#### **APPENDIX D**

##### **CLAUSES FOR CONSTRUCTION/USE/ACCESS TO REAL PROPERTY ACQUIRED UNDER THE ACTIVITY, FACILITY OR PROGRAM**

The following clauses will be included in deeds, licenses, permits, or similar instruments/agreements entered into by **COUNTY OF HIDALGO** pursuant to the provisions of Assurance 7(b)”

A. The (grantee, licensee, permittee, etc., as appropriate) for himself/herself, his/her heirs, personal representatives, successors in interest, and assigns, as a part of the consideration hereof, does hereby covenant and agree (in the case of deeds and leases add, “as a covenant running with the land”) that (1) no person on the ground of race, color, or national origin, will be excluded from participation in, denied the benefits of, or be otherwise subjected to discrimination in the use of said facilities, (2) that in the construction of any improvements on, over, or under such land, and the furnishing of services thereon, no person on the ground of race, color, or national origin, will be excluded from participation in, denied the benefits of, or otherwise be subjected to discrimination, (3) that the (grantee, licensee, lessee, permittee, etc.) will use the premises in compliance with all other requirements imposed by or pursuant to the List of discrimination Acts And Authorities.

B. With respect to (licenses, leases, permits, etc.), in the event of breach of any of the above nondiscrimination covenants, **COUNTY OF HIDALGO** will have the right to terminate the (license, permit, etc., as appropriate) and to enter or re-enter and repossess said land and the facilities thereon, and hold the same as if said (license, permit, etc., as appropriate) had never been made or issued.\*

C. With respect to deeds, in the event of breach of any of the above nondiscrimination covenants, **COUNTY OF HIDALGO** will there upon revert to and vest in and become the absolute property of **COUNTY OF HIDALGO** and its assigns.\*

(\*Reverter clause and related language to be used only when it is determined that such a clause is necessary to make clear the purpose of Title VI.)

#### **APPENDIX E**

##### **TITLE VI LIST OF PERTINENT NONDISCRIMINATION ACTS AND AUTHORITIES**

During the performance of this contract, the Contractor, for itself, its assignees, and successors in interest (hereinafter referred to as the “Contractor”) agrees to comply with the following non-discrimination statutes and authorities; including but not limited to:

**Pertinent Nondiscrimination Authorities**

- Title VI of the Civil Rights Act of 1964 (42 USC § 2000d et seq., 78 stat. 252) (prohibits discrimination on the basis of race, color, national origin);
- 49 CFR part 21 (Non-discrimination in Federally-assisted programs of the Department of Transportation—Effectuation of Title VI of the Civil Rights Act of 1964);
- The Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, (42 USC § 4601) (prohibits unfair treatment of persons displaced or whose property has been acquired because of Federal or Federal-aid programs and projects);
- Section 504 of the Rehabilitation Act of 1973 (29 USC § 794 et seq.), as amended (prohibits discrimination on the basis of disability); and 49 CFR part 27;
- The Age Discrimination Act of 1975, as amended (42 USC § 6101 et seq.) (prohibits discrimination on the basis of age);
- Airport and Airway Improvement Act of 1982 (49 USC § 471, Section 47123), as amended (prohibits discrimination based on race, creed, color, national origin, or sex);
- The Civil Rights Restoration Act of 1987 (PL 100-209) (broadened the scope, coverage and applicability of Title VI of the Civil Rights Act of 1964, the Age Discrimination Act of 1975 and Section 504 of the Rehabilitation Act of 1973, by expanding the definition of the terms “programs or activities” to include all of the programs or activities of the Federal-aid recipients, sub-recipients and contractors, whether such programs or activities are Federally funded or not);
- Titles II and III of the Americans with Disabilities Act of 1990, which prohibit discrimination on the basis of disability in the operation of public entities, public and private transportation systems, places of public accommodation, and certain testing entities (42 USC §§ 12131 – 12189) as implemented by U.S. Department of Transportation regulations at 49 CFR parts 37 and 38;
- The Federal Aviation Administration’s Nondiscrimination statute (49 USC § 47123) (prohibits discrimination on the basis of race, color, national origin, and sex);
- Executive Order 12898, Federal Actions to Address Environmental Justice in Minority Populations and Low-Income Populations, which ensures nondiscrimination against minority populations by discouraging programs, policies, and activities with disproportionately high and adverse human health or environmental effects on minority and low-income populations;
- Executive Order 13166, Improving Access to Services for Persons with Limited English Proficiency, and resulting agency guidance, national origin discrimination includes discrimination because of limited English proficiency (LEP). To ensure compliance with Title VI, you must take reasonable steps to ensure that LEP persons have meaningful access to your programs (70 Fed. Reg. at 74087 to 74100);
- Title IX of the Education Amendments of 1972, as amended, which prohibits you from discriminating because of sex in education programs or activities (20 USC 1681 et seq).

Please confirm

\*Response required

## 7.9. [APPENDIX H](#)

### 7.9.1. [REQUIRED CONTRACT CLAUSES FOR NON-FEDERAL ENTITY CONTRACTS UNDER FEDERAL AWARDS\\*](#)

Please download the below documents, complete, and upload.

- [Appendix H - 2 CFR.pdf](#)

\*Response required

## 7.10. [APPENDIX I](#)

### 7.10.1. [FHWA 1273\\*](#)

Refer to "Appendix I - FHWA 1273" in the [#ATTACHMENTS](#) section. Confirm that you have read, understood and agree with "Appendix I - FHWA 1273."

Please confirm

\*Response required

## 7.11. [APPENDIX J](#)

### 7.11.1. [PROPOSER'S AFFIDAVIT OF NON-COLLUSION, NON-CONFLICT OF INTEREST, AND ANTI-LOBBYING\\*](#)

Please download the below documents, complete, and upload.

- [Appendix J - Proposer's Aff...](#)

\*Response required

## 7.12. [APPENDIX K](#)

### 7.12.1. [DRAFT AGREEMENT\\*](#)

Refer to "Appendix K - Draft Agreement" in the [#ATTACHMENTS](#) section. Confirm that you read, understood, and agree with "Appendix K - Draft Agreement."

Please confirm

\*Response required

## 7.13. [APPENDIX L](#)

### 7.13.1. [DEFICIENCIES AND DEVIATIONS FORM\\*](#)

Please download the below documents, complete, and upload.

- [Appendix L - Deficiencies a...](#)

\*Response required

## 7.14. [APPENDIX M](#)

### 7.14.1. [REFERENCE FORM\\*](#)

Please download the below documents, complete, and upload.

- [Appendix M - Reference Form...](#)

\*Response required

**APPENDIX A**  
**REQUIREMENTS/SPECIFICATIONS**

**HIDALGO COUNTY**  
**REQUEST FOR PROPOSALS**

**“Consulting Services for  
Self-Funded Health Plan”**

**RFP NO: 23-0342-02-14-08**

**PROJECT DESCRIPTION:**

The County of Hidalgo is requesting proposals from qualified Health Benefits Consultants that are 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 basic life insurance with accidental death and dismemberment, and voluntary benefit plans offered by Hidalgo County for approximately 4,300.

**NOTICE OF PARTICIPATION:**

The Hidalgo County Drainage District No. 1 Board of Director’s may, at their option, utilize the “**Consulting Services for Self-Funded Health Plan**” 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 Health Plan**” 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 benefits provider(s) and assure that replacement coverage is selected and in place 60 days before the County’s annual benefits enrollment. The Hidalgo County Purchasing Department will receive sealed envelopes containing request for proposals with qualifications for the provision of “**Consulting Services for Self-Funded Health Plan**” as specified herein.

**RFP REQUIREMENTS**

**OVERVIEW:**

Hidalgo County is seeking qualified professionals to provide “Consulting Services for Self-Funded Health Plan” to assist in a full range of services related to the design, implementation, maintenance, communication, and improvement of the County’s health and related benefits programs including compliance of federal and state laws and to assist the County in the benefit request for proposal process.

The scope of procurement is to establish a professional services contract with a qualified consultant to provide a full range of consulting services related to claims analysis, benchmarking, budget projection, plan design, implementation, maintenance, communication, and strategic improvements of all benefits programs.

The scope of work for these services is fluid and subject to addition based on the ever-changing health care and benefits environment. The services listed below are considered essential (not all-inclusive) services to be performed by the Consultant.

**BENEFITS CONSULTANT 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 experience with Self-Funded Group Health Plans.
- b. A description of the firm’s proposed personnel and their most recent similar projects, an organizational chart with a primary and secondary point of contact, include biographies of the personnel in response to this RFP;
- c. A summary example of at least one similar project with a county government;
- d. 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;

- e. A summary of the work plan, approach, tasks and outline of information that will be required from Hidalgo County;
- f. A typical schedule for the completion of this type of project; and
- g. Additionally, the names of the personnel proposed for this project who participated in the listed projects should be provided;
- h. Errors and Omissions Insurance (Min. \$1 million per occurrence);
- i. Pursuant to Article 21.07-2 of the Insurance Code of 1951, Hidalgo County is requiring a copy of your
  - a.) Life and Health Insurance Counselor License to ensure compliance with said stature along with all other State, Federal or Local requirements.
  - b.) Firms submitting proposals must be represented by an individual who holds a current Life and Health Counselor's License (LHIC) issued by the Texas Department of Insurance.
- j. The Consultant must demonstrate that they have the expertise, resources, capability, and experience to provide the materials and services for employers with at least 4,300 employees. Such qualifications must be fully evident within the proposal and verifiable through a minimum of three (3) references. References must be for similar work performed during the past five (5) years of which three (3) references must be from Texas public sector clients of similar size.
- k. The County requires a Texas licensed Consultant who is independent and is not directly, or indirectly, affiliated with any health insurance company, third party administrative agency, or provider network.

This project is limited to ten (10) pages.

**PROHIBITIONS:**

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

- (A) The Consultant must not have any monetary or financial interest with a potential vendor.
- (B) The Consultant will not be allowed to sell any products related to Hidalgo County employee benefit insurance plans.

**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 Benefits 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:** Hidalgo County's goal is to select the vendor who will be the most effective and dynamic partner in performing the full range of services related to the design, implementation, maintenance, communication, and improvement of the County's health and related benefit programs including compliance of federal and state laws and to assist the County in the benefit request for proposal process. These services include, but are not limited to the following:

## **SELF-FUNDED GROUP HEALTH PLAN ANALYSIS AND EVALUATION:**

- **Monitor current health benefits provider**
  - Review and make recommendations regarding: (1) existing self-funded health benefit plan and programs, (2) modifications to the existing plan design, cost (rates), and cost shares, and (3) potential benefit plan options.
  - Review and analyze claims experience data, claims service, efficiency and accuracy of claims administration to ensure that the County is receiving optimum service and benefits from all carriers and vendors.
  - Annually review insurance carrier(s) contracts and third party administrators contract to assure the most cost effective provider utilization.
  - Review specific stop loss limits.
  - Review and evaluate claims history for benefit programs currently in place and provide an analysis of current provider networks and possible options.
  - Work with County to develop funding and contribution strategies
  - Advise County regarding “gaps” in coverage and/or inadequate coverage.
- **Annual rates and fiscal year expenditures**
  - Determine plan year rates for each of the self-funded medical plans.
  - Recommend contribution levels for active employees, retirees without Medicare, and retirees with Medicare for the self-funded plan(s).
  - Evaluate tier structures and dependent factoring as necessary.
  - Recommend funding levels for the County’s health plan reserve.
  - Compare fiscal year budgeted to actual expenditures and explain variances at the end of each County fiscal year.
- **Plan design and innovation solutions**
  - Recommend innovative changes in plan design and offerings to achieve County’s performance objectives.
  - Keep abreast of the latest plan design concepts and county industry trends in employee benefit plan designs and cost sharing.
  - Operate in a state of continuous quality improvement and innovation for striking a balance between cost savings and plan services for County employees.
  - Evaluate health insurance networks and advise the County on potential cost differences.
- **Exploration of cost containment strategies**
  - Analyze the County’s current conditions to include our specific demographics and develop the appropriate cost controls while still offering market competitive plans.
  - Advise the County on plan design, disease management, communications, decision support tools, health education and wellness strategies; assist in implementing corresponding programs as appropriate.
- **Information and data collection.**
  - Meet with and provide monthly reports to the Department of Human Resources as it relates to plan performance, updates and other information pertinent to their benefits offering.
  - Perform ongoing, complex analysis of medical and drug claim expenses, prepare and maintain historical comparative data, evaluate and communicate trends and forecast expected claims exposure.
  - Perform detailed modeling of alternative scenarios and recommend employee and County contribution models for the self-funded group health plan(s), assisting in plan/claim cost projections or forecasts for all health or wellness related costs, and any cost saving measures or recommendations determined necessary.
  - Actively participate and make presentations to the County’s staff, management team, and/or Commissioners’ Court.

## **CONTRACTING & PROPOSALS:**

- **Assist the County in the Benefits RFP process.**
  - Prepare all documents for bid/request for proposals documents for insurance services of employee benefit programs including but not limited to contracted self-funded employer group

health benefits, fully insured ancillary (voluntary) benefits, Stop Loss Reinsurance, Employee Assistance Program and COBRA Administration services

- Prepare solicitation, evaluate and make recommendations on the providers of benefit insurance products offered by the County.
- **Solicitation of qualified insurers and vendors.**
  - Provide a sample initial and second publication posting required by the Texas Local Government Code and insure that all bids and/or proposals solicitations comply with the procurement requirement in the Texas Local Government Code.
  - Provide a sample letter to current carriers/administrators to release data and prepare HIPPA business associate agreement(s) and other documents necessary under HIPPA Privacy Rule to allow access by the County and their designees to access, uses and disclose (PHI).
  - Prepare and distribute Addendum to all participants of the bid/proposals process for:
    - Any questions and clarifications of the bid/proposal specifications
    - Additional information requests
  - Secure from all proposers confirmation of their proposals
- **Analysis of responses for recommendation.**
  - Collect, organize, and analyze the data into a format conducive to receiving responses for inclusion in the analysis of the bids/ proposals.
  - Evaluate eligibility, cost sharing and benefits structure and network savings.
  - Evaluate cost containment alternatives to help control current and future plan costs in conjunction with the rate review.
  - Conduct contract negotiations with benefit plan providers on matters including, but not limited to, premium rates, benefit levels, performance standards and guarantees, contractual terms and conditions, quality assurance standards, utilization and performance reports, statistical and/or financial reports, and plan specific data such as medical conditions, prescription drugs, high cost procedures, in-patient data, etc.
  - Analysis of bids / proposals:
    - Prepare a spreadsheet analysis of bids/proposals received so that a comparison can be made.
    - Prepare a narrative, with recommendations, discussing the bids/proposals and various options under consideration
- **Selection and presentation of finalists; and**
- **Program premium recommendation.**
- **Program implementation (effective 01/01/2025)**
  - Notify all bidders of County's decision
  - If necessary, develop and monitor a transition plan to a new carrier or administrator so that there is no disruption of employee benefits
  - Review insurance policies and/or administrative service agreements to verify that they are consistent with bid response
  - Review employee benefit administration procedures and if necessary make recommendations to provide for efficient administration with new carriers or administrators
  - Coordinate between new carrier and/or administrators and the County, enrollment of employee benefit programs,
  - Assist in the development of materials to communicate to employees any benefit change
- **Initiatives to reduce group healthcare cost such as wellness programs.**
  - Represent County in all negotiations with providers on all issues including those related to premiums, benefit levels, plan design and special terms and conditions
  - Conduct annual renewals and negotiations for health and benefit plans, as needed.
  - Manage the renewal process with the current carrier to control costs
  - Implement carrier renewal strategies with County
  - Provide renewal alternatives with cost impact of benefit plan changes

## **REPORTING:**

- **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.**
  - Make quarterly reports and presentations to the Commissioners Court.
  - Create employee contribution modeling reports
  - Annual Financial Reports (End of Year Accounting)
    - Executive summary of program expenses
    - Claims information (Percent of benefit dollars paid by employee, claims by size, benefits paid by type of service, Physician visit details, etc.)
    - Comparison on current costs to renewal costs, plan funding to budget comparison, fixed expense comparison, and future plan cost projections
    - Incurred but not reported (IBNR) claims analysis,
    - Overview of specific stop-loss projections

## **COMPLIANCE, LEGISLATIVE AND REGULATORY ASSISTANCE:**

- Monitor proposed and/or enacted state and federal legislation and regulatory changes and procedures that affects the administration of plan benefits and related plan documents. Review compliance with FMLA, ADA, ACA, USERRA, COBRA, HIPAA, Medicare Part D, and other regulatory compliance and reporting.
- Provide County staff with regular and ongoing updates to applicable laws via electronic communication and in-person meetings.
- Review County’s group benefit plans for compliance with all required notices and documents and will update and prepare any necessary notices and documents to ensure compliance with all state and federal legislation, including but not limited to Administration of Section 125 Regulations, development/update of cafeteria plan document, HIPAA compliance and all other compliance documents necessary for benefits administration.
- Review County’s summary plan description for compliance with all state and federal legislation and will provide advice and guidance necessary to be compliant.
- Review County policies and practices for PPACA compliance. This includes any laws or regulations impacting eligibility for group benefits, notification requirements, reporting requirements or fees payable.

## **ONGOING CONSULTING:**

- Provide “leading edge” information to the County regarding regional and national trends, labor market conditions, claims cost trends, alternative delivery systems, legal requirements, and innovative ideas in benefit plan design and administration with implication and cost benefit analysis.
- Develop an overall strategy to identify goals, analyze program cost and risk management strategies, and funding arrangements in the following areas that impact benefits to attain the highest level of efficiency, cost savings, and employee satisfaction.
- Review and evaluate current scope of benefits package (e.g. types and levels of coverage), with evaluation of existing benefits and recommendations for updates, new products, programs and services to ensure a competitive benefits plan.
- Review and report on plan performance benchmarks with comparisons to the local area and industry studies.
- Review benefit plan documents, including summary plan descriptions, contracts, employee summaries, and policies/procedures, update and prepare as necessary.
- Review and be responsible for the accuracy and correctness, prior to delivery, of excess/reinsurance coverage documents and/or pricing policies, including all changes and endorsements.
- Assist with HIPPA training/compliance for designated County staff, as requested.
- Research and advise Hidalgo County on any new developments in relevant law and employee benefit programs on an ongoing basis and ensuring the county remains in compliance with these new laws.
- Provide timely notification of and assistance with understanding and implementing new, updated or revised

benefits, laws, regulations and programs as they relate to plan documents or contracts.

- Provide general consultation on voluntary benefit products, and group health and welfare benefits including wellness program incentives.
- Assist the County in its ongoing evaluation of the feasibility of a county employee health clinic.
- Review, recommend, and assist the County with building a result driven wellness program that includes: program and course offerings, multiple incentives, setting targets for future year comparisons, and to assess the program's overall effectiveness.

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

7.15. COMPANY/FIRM RESPONSE

*7.15.1. COMPANY/FIRM RESPONSE\**

Please upload your response to this RFP in accordance with Exhibit A - Requirements/Specifications.

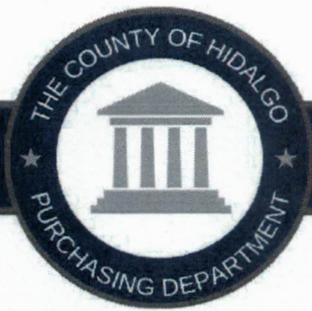
\*Response required



# **EXHIBIT “B”**

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COMPANY’S RESPONSE



## Best and Final Offer (BAFO)

**TO:** Yvonne Ortegon/Ortegon Insurance Agency, LLC  
**FROM:** Cassandra Carr, Contract Specialist II  
**DATE:** April 18, 2024  
**RE:** Best and Final Offer (BAFO) for H.C. Human Resources –“Consulting for Self-Funded Health Plan” RFP 23-0342-02-14-08

Please be advised that you have been selected to enter into negotiations with The County of Hidalgo for the “Consulting for Self-Funded Health Plan.”

Hidalgo County Purchasing Department is asking for you to submit a best and final offer (BAFO) for the proposed scope of work and services for the mentioned project.

**We request that you submit a proposed best and final offer “BAFO” by no later than 2:00 p.m. on Thursday, April 25, 2024.**

DESCRIPTION OF SERVICES	Annual Fee	Monthly Installments	BAFO Annual	BAFO Monthly Installments
Fee schedule for Consulting Services for Self-Funded Health Plan	\$82,500	\$6,875	\$75,000	\$6,250
COMMENTS:		The BAFO Annual/Monthly are a set fee.		
		There will be no additional fee for the		
		scope of work listed on the RFP.		

We ask that you approve by signing below acknowledgment of receipt with commitment to submit by deadline and return via email to: [cassandra.carr@co.hidalgo.tx.us](mailto:cassandra.carr@co.hidalgo.tx.us).


Signed: *Yvonne Ortegon* Title: CEO/Owner  
Printed Name: Yvonne Ortegon Date: 04/22/2024

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# Hidalgo County Evaluation Committee Presentation

Consulting Services for Self-Funded Health Plan  
RFP 23-0342-02-14-08  
April 1, 2024

Yvonne M. Ortegon  
Ortegon Insurance Agency, LLC



1

## Agenda

Company Background	Services Provided to Hidalgo County	Self-Funded Health Plan Scope of Services	Experience in Self-Funded Health Insurance Plans
Examples of Proven Savings Value Added Services	References	Cost of Service	

2

## Company Background

At Ortegon Insurance Agency, LLC we have over 30 years combined experience in the Insurance and Human Resources Industries. We are Texas Certified Women Owned Small Business (WOSB) and HUB Certified. We are also federally SBA Certified WOSB and HUBZone. We are licensed to provide consulting and insurance services in the State of Texas. We exclusively focus on the needs of the public sector in South Texas.

Our goal is to match businesses with value-driven insurance plans and services. We work with integrity and supply our clients with candid, expert advice, and caring customer service and skill.



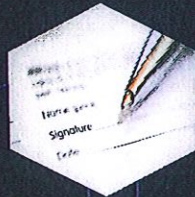
3

## Services Provided to Hidalgo County



### Analysis of Self-Funded Health Plan, Stop Loss, & Pharmacy

Review of prior data to prepare analysis and make recommendations for plan designs, savings, and budget forecasts



### Request for Proposals (RFP) Process

Assist in solicitations and selections or providers for self-funded health plan and voluntary insurances



### Design Custom Presentations for Administration & the Commissioners Court

Provide findings, potential savings, recommendations for improvements, and budget analysis



### Compliance

ACA, COBRA, HIPAA, FMLA, Section 125

Review and recommend changes to ensure compliance with State and Federal Mandated Laws



### Education of Staff & Employees Communications

Educational Materials, and support for the Risk Management Department

4

4

# Self-Funded Health Plan

## Scope of Services



### Plan Design

Review current plans to and make recommendations for benefit plan options.



### Cost Containment Strategies

Assist in determining cost controls, disease management, health education, and wellness strategies.



### Claims Analysis

Evaluate claims history and provider networks to assist the plan is receiving the optimum cost effectiveness.



### RFP Process

Solicitation of qualified insurers and vendors and analyze response for recommendations.



### Budget Forecast

Develop funding and contribution strategies.



### Compliance

Assist with compliance of FMLA, ADA, ACA, USERRA, COBRA, HIPAA, and Medicare Part D.



### Vendor Management

Assist the County in receiving services and benefits from carriers and vendors at best value.



### Reporting & Staff Education

Monthly, quarterly, and annual reporting to Administration & Commissioners Court.

# Experience in Self-Funded Health Insurance Plans



## Examples of Proven Savings

### Example 1

- For the Plan Year 10/01/2023-9/30/2024 for a municipality their initial renewal was at a 13% rate increase. Through negotiations, we were able to lower the initial renewal to a rate pass. Administration wanted to still go out for RFP to obtain better plan options and reduce costs. Final recommendation was to move carriers, provided a plan with lower copays, added GAP insurance to cover entire cost of the deductible.
- Overall, the municipality was able to cover the cost of the employee only rate at 100% and the GAP insurance at a budgetary savings to the employer and no cost to the employees.

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## Examples of Proven Savings

### Example 2

- For a school district's self-funded health plan, we reviewed their plan design, health plan cost drivers, disease management, networks, and claims history. Our recommendations to reduce costs and enhance their benefits were as follows:
- Traditionally, to improve plan performance, most would recommend to shift the cost to the employee by increasing premiums, copays, or deductibles. That is not always the best practice. Instead, we focused on recommending programs that would provide employees with access to better care and improve their health status to address the root of the high costs. Therefore, we recommended the following solutions to implement:
  - Pharmacy – Manage specialty drugs
  - Implement Preferred Medical Providers – Provide zero copays for providers in the network that are identified to reduce costs to the plan.
  - Disease Management – Chronic Health Conditions
  - Reduce Emergency Room (ER) Costs
  - Education/Communication - Annual physicals
  - Implement Conditional Offers for Spouse Coverage
  - Implement Wellness Programs

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## Examples of Proven Savings



### Example 3

- Through the RFP Process for a school district's self-funded health plan, we were able to recommend plan designs and negotiate the rate with the existing insurance carrier to reduce fixed costs by a 6.4% which calculated to a savings of approx. \$115k for the new plan year.



### Example 4

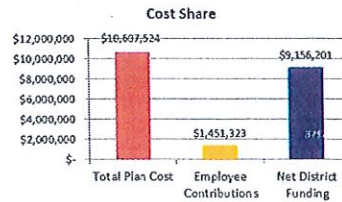
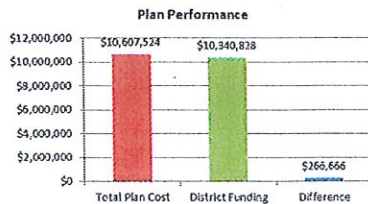
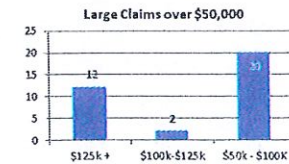
- RFP was conducted for a municipality for a fully-insured medical plan. The renewal rate for their medical plan was negotiated from the initial 18% increase to a 7.9% increase. After receiving competitive bid responses, we were able to recommend an equivalent plan with another carrier to reduce their renewal rates to a 1.2% decrease.

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## Self-Funded Analysis Example

### Self-Funded Health Plan Analysis October 1, 2021 – September 30, 2022

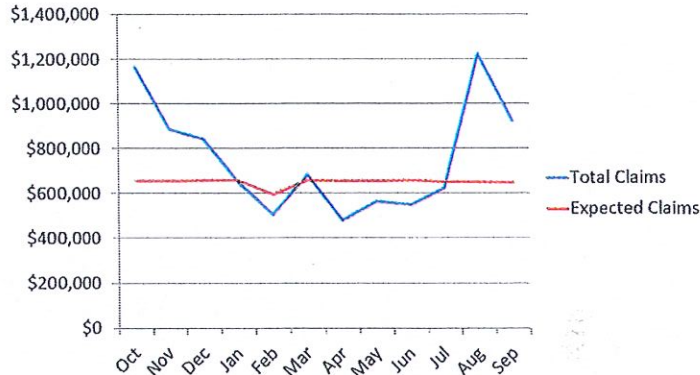


Premium Equivalent Rates & Employee Contributions are based on enrollment count from UIC system, not actual payroll records.  
Prepared by Oregon Insurance Agency, LLC

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# Analysis Example Continued

## Claim Performance

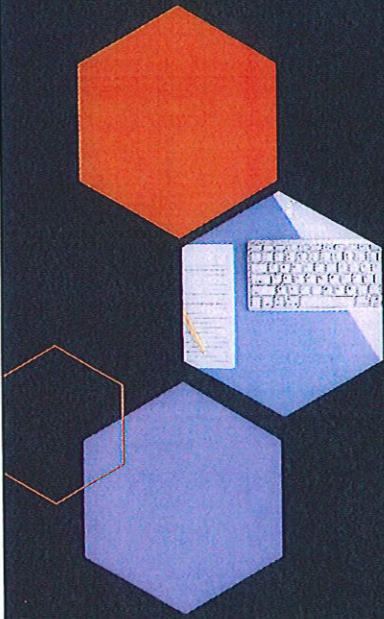


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# Analysis Example Continued

Total Plan	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Total
<b>Enrollment</b>													
Employee Only	1111	1118	1111	1118	1117	1119	1111	1110	1114	1125	1104	1108	13170
Employee + Spouse	47	47	47	48	44	47	46	45	46	45	45	43	510
Employee + Child(ren)	275	275	277	277	278	280	281	280	278	285	281	281	3211
Employee + Family	23	26	21	21	21	22	21	21	21	21	21	20	252
Total Enrollment	1456	1467	1456	1464	1459	1467	1459	1457	1460	1465	1451	1452	17253
Total Members	3143	3155	3152										
<b>Plan Cost</b>													
Administrative Fee	\$11,111	\$11,111	\$11,111	\$11,111	\$11,111	\$11,111	\$11,111	\$11,111	\$11,111	\$11,111	\$11,111	\$11,111	\$132,732
Individual Health Plan	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$120,000
Aggregate Stop Loss	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$12,000
Total Plan Cost	\$22,111	\$22,111	\$22,111	\$22,111	\$22,111	\$22,111	\$22,111	\$22,111	\$22,111	\$22,111	\$22,111	\$22,111	\$264,732
<b>Claims - Total</b>													
Medical	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$12,000,000
Prescription Drug	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$1,200,000
Total Claims	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$13,200,000
Claims over Stop Loss (\$1M, 90%)	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$1,200,000
Net Claims	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$12,000,000
<b>Total Plan Cost (Paid + Claims)</b>	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$416,732
<b>Plan Performance</b>													
Total Claims	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$13,200,000
Expected Claims	\$650,000	\$650,000	\$650,000	\$650,000	\$650,000	\$650,000	\$650,000	\$650,000	\$650,000	\$650,000	\$650,000	\$650,000	\$7,800,000
Loss Ratio	170%	170%	170%	170%	170%	170%	170%	170%	170%	170%	170%	170%	170%
<b>Aggregate Performance</b>													
Total Claims	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	\$13,200,000
Aggregate Attach/Ret Foot	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$1,200,000
Loss Ratio	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>Total Cost - Plan Performance</b>													
Total Plan Cost (Paid + Claims)	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$416,732
Plan Premium Rates	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$1,200,000
Rate Under H. Rates	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$1,200,000
<b>Net Cost</b>													
Total Plan Cost	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$34,222	\$416,732
Employee Contribution	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$1,200,000
Net	\$134,222	\$134,222	\$134,222	\$134,222	\$134,222	\$134,222	\$134,222	\$134,222	\$134,222	\$134,222	\$134,222	\$134,222	\$1,616,732
<b>Notes</b>													
Individual Stop Loss	\$100,000												\$1,200,000
Re-Entrable													

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# References

- San Benito CISD
- Weslaco ISD
- Edcouch-Elsa ISD
- Pharr-San Juan-Alamo ISD
- Cameron County
- City of Edinburg
- City of San Juan
- City of Donna
- City of Mercedes

**Letters of Recommendation**

- San Benito CISD
- City of San Juan
- City of Edinburg

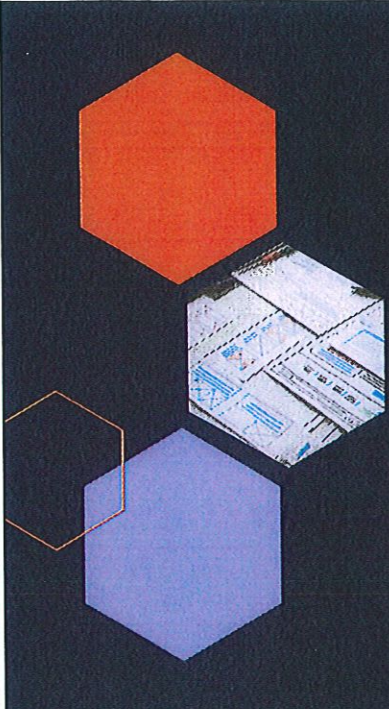
13

## Summary

Certifications, Licenses, and E & O	Consulting Services	Experience	References	Examples of Proven Savings
<p>Women Owned Business (WBE) and HUB Certified</p> <p>State Licenses:</p> <ul style="list-style-type: none"> <li>• General Lines Agency in Life, Accident, Health and HMO</li> <li>• Health Insurance Counselor Agency</li> <li>• General Lines Agency in P&amp;C</li> <li>• Risk Management Agency</li> </ul> <p>Errors &amp; Omissions Coverage</p>	<ul style="list-style-type: none"> <li>• Self-Funded Health Insurance</li> <li>• Voluntary Products</li> <li>• Employee Benefits</li> <li>• Risk Management</li> <li>• Compliance</li> <li>• Enrollment Services - ENAV</li> <li>• Customer Service</li> <li>• Communications</li> <li>• Bilingual Staff</li> <li>• Health Fairs and Immunizations Clinics</li> </ul>	<ul style="list-style-type: none"> <li>• Self-Funded Analysis including plan design, monitoring, benchmarking, managing, and negotiating.</li> <li>• Experience as an Administrator for a school district with knowledge of compliance, communications, recommendations, report and presentations.</li> </ul>	<ul style="list-style-type: none"> <li>• San Benito CISD Recommendation Letter Included</li> <li>• Weslaco ISD</li> <li>• Edcouch-Elsa ISD</li> <li>• PSJA ISD</li> <li>• Cameron County</li> <li>• City of San Juan Recommendation Letter Included</li> <li>• City of Edinburg Recommendation Evaluation Included</li> <li>• City of Donna</li> <li>• City of Mercedes</li> </ul>	<ul style="list-style-type: none"> <li>• Self-Funded RFP analysis/recommendations</li> <li>• Municipality RFP Savings</li> <li>• Annual budget review and recommendations on employee &amp; employer rates</li> <li>• Annual Report for Self-funded Plan</li> <li>• RFP Comparison</li> <li>• Multiyear Analysis of Self-Funded Health Plans</li> </ul>

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## Cost of Services

Ortegon Insurance Agency is proposing an annual set fee of \$82,500.00 for the following scope of services listed on the RFP as follows:

- Self-Funded Group Health Plan Analysis & Evaluation
- Exploration of Cost Containment Strategies
- Contracting & Proposals (RFP Process)
- Program Implementation & Monitoring
- Reporting & Education
- Compliance, Legislative, and Regulatory Assistance
- Ongoing Consulting Services as listed in the RFP


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## Conclusion

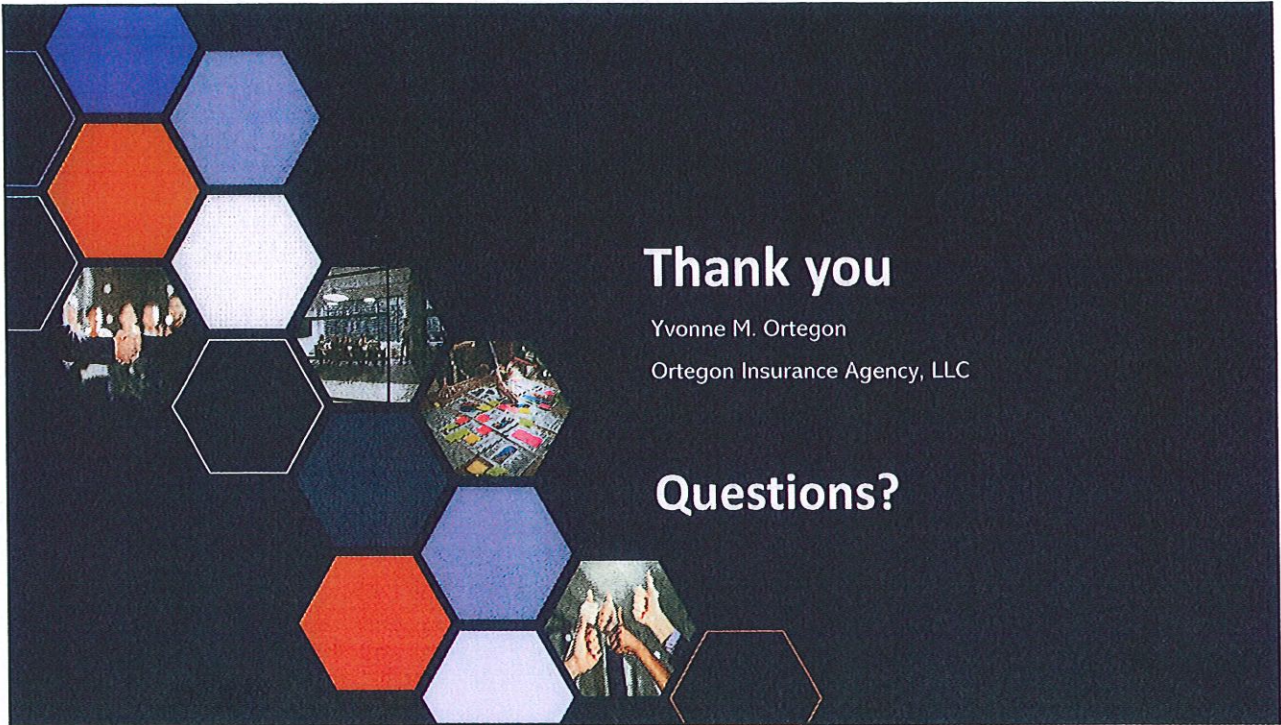
At Ortegon Insurance Agency, we believe in giving 110%. We thrive because of our market knowledge in working with school districts, municipalities, and counties in the Rio Grande Valley. We have worked tirelessly to earn a reputations for superior customer satisfaction by providing value added services to our clients.

"Strive not to be a success, but rather to be of value."  
Albert Einstein



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**Thank you**

Yvonne M. Ortegon  
Ortegon Insurance Agency, LLC

**Questions?**

# References



**Dr. Nate Carman**  
Superintendent of Schools

August 23<sup>rd</sup>, 2020

RE: Recommendation for Yvonne Ortegon

To Whom It May Concern,

I have had the opportunity to work with Yvonne Ortegon in her capacity as the Insurance Agent of Record for San Benito CISD since September, 2017.

Over each of the past three years I have observed the enrollment of our employees implemented by Ortegon and have found it to be efficient and effective. Our employees received information and support in a timely manner, enabling them to make the correct decisions regarding their insurance options.

Additionally, I have witnessed the customer service our employees received throughout each plan year. Calls and emails from our employees were answered in a timely fashion and appropriate support was given to our employees, especially when they needed it most. People don't tend to call an agent during a plan year unless they are dealing with a health concern. Yvonne and her staff were empathetic in their approach and we received positive feedback regularly.

Finally, Yvonne prepared and presented reports regarding our plan implementation to our Board of Trustees regularly. Her reports were timely and useful. She did an excellent job of providing enough information so that it was digestible and meaningful.

It is without hesitation that I recommend Yvonne Ortegon to your organization as your Agent of Record.

If I can provide further information, please do not hesitate to contact me.

Sincerely,

**Nate Carman, Ed.D.**

Dr. Nate Carman

**Board of Trustees**

Orlando López  
President

Sonia Weaver  
Vice-President

Janie G. Silva  
Secretary

M.L. Garcia  
Angel Mendez  
Baldemar Olivarez, Jr.  
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It is the policy of the San Benito CISD not to discriminate on the basis of race, color, national origin, gender, or disability in its educational and Career and Technology programs, services or activities as required by Title VI of the Civil Rights Act of 1964.





Mayor: Mario Garza  
Mayor Pro-Tem: Leonardo "Lenny" Sanchez  
Commissioners: Ernesto "Neto" Guajardo  
Jesus "Jesse" Ramirez  
Marco "Markie" Villegas

September 15, 2020

To Whom It May Concern:

I have had the opportunity and pleasure in working with Mrs. Yvonne Ortegon as our Agent of Record for the City of San Juan since October 2019. She has proven to be dedicated and committed to our City; moreover, she has the employee's best interest at heart.

Mrs. Ortegon has been instrumental in ensuring the City's compliance with COBRA, HIPAA, Federal and State required reporting, cost containment, contract analysis, and vendor compliance. She has provided excellent customer service to our administration and employees. She has also worked extremely well with our Human Resources and Finance employees – they feel comfortable working with her and her staff.

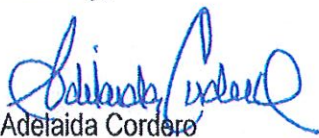
Ms. Ortegon has also conducted and overseen our annual Open Enrollments. This includes providing our employees with benefit booklets and presentations in English and Spanish to ensure our employees understand the benefits that are available to them. Her agency also provides our Department of Finance (payroll) with the necessary payroll adjustment reports and assists in monthly audits of all insurance carrier billing to ensure accuracy.

Overall, Ms. Ortegon has been able to maintain/secure all our insurance benefits and rates at the same cost with no increase in rates and no benefit plan changes. She also coordinates and oversees the City's Annual Health Fair, which has been a tremendous success. Our employees have participated more this past year and look forward to the upcoming.

In closing, our City has not worked with an Agent of Record that is as dedicated and detailed oriented as Mrs. Ortegon; therefore, it is my honor to recommend her to your organization as your Agent of Record. Her work ethic is commendable and much appreciated and look forward to a continued working relationship with Ms. Ortegon for future years to come.

Should you have any questions or require additional information, please contact me at (956) 821-4085.

Sincerely,

  
Adela Cordero  
Director of Human Resources

Past Performance Questionnaire (PPQ)  
Employee Benefits Consulting Services

Instructions to Offeror for sending Reference Questionnaire Forms:

Prepare and send a reference questionnaire package for each project you list as a reference for the Past Performance evaluation factor. You will upload the PPQ's into Bonfire under the Requested Information tab. If you do not submit any PPQ's, you will not receive any points during the evaluation.

The past performance questionnaire must be independently completed by the offeror's client references. Offerors are responsible for ensuring that their client references complete this questionnaire. Procurement Services will not receive any PPQ's separately.

A list of at least three (3) references from current customers. References must include Educational Agencies (K-12 preferred), Government Agencies and/or firms, which are substantially serviced by the Proposer (references most similar to SAISD must be provided).

It is the Offeror's responsibility to follow-up and to encourage references to return their questionnaire to your company.

---

NAME OF PROPOSER: Ortegon Insurance Agency, LLC


Phone: 956-373-1109 Fax: 956-375-2414 E-Mail: yvonne@ortegonagency.com

**I. Past/Current Reference Information**

1. Contract or Identifying Number: Employee Benefits Consultant
2. Contract Value: \$45,000
3. Period of Performance: April 4, 2023 - April 4, 2024
4. Brief description of items provided:

Served as Consultant for the Health Plan and Voluntary Products including vendor management, RFP process, recommendations, compliance, presentations, and additional consulting sedrvices.

---

5. Name of Person Completing Questionnaire: Beinda Torres 

Agency/Company:  
City of Edinburg

Title: Director of Human Resources Phone: 956-388-8652

E-mail: btorres@cityofedinburg.com

II. EVALUATION. Please rate the Proposer utilizing the guide below. Explanatory narratives for as many responses as possible would be appreciated. These narratives need not be lengthy, just detailed. Attach additional pages if more space is needed.

Evaluation Definitions – The following definitions should be used in the assessment of Contractor performance.

<u>EXCEPTIONAL</u>	Performance <u>EXCEEDS MOST</u> contractual requirements. The performance of areas being assessed was accomplished with few minor issues or concerns.
<u>VERY GOOD</u>	Performance <u>EXCEEDS SOME</u> contractual requirements. The performance of areas being assessed was accomplished with few minor issues or concerns, for which the Contractor’s corrective actions were highly effective.
<u>SATISFACTORY</u>	Performance <u>MEETS</u> contractual requirements. The performance of the areas being assessed contains minor issues or concerns, for which corrective actions taken by the Contractor were effective.
<u>MARGINAL</u>	Performance <u>MEETS SOME</u> contractual requirements. The performance of the areas being assessed includes significant problems, issues, or concerns for which corrective actions taken by the Contractor were only somewhat effective.
<u>UNSATISFACTORY</u>	Performance <u>DOES NOT MEET</u> contractual requirement. The performance of the areas being assessed includes serious problems, issues, or concerns for which the Contractor’s corrective actions were ineffective.
<u>NOT APPLICABLE (N/A)</u>	Performance information not recent or relevant as defined in the Solicitation. Unable to provide assessment.

**Past Performance Evaluation**

1. Has this company provided this type of service to your District/Company? If not, what work did this vendor do for your District/Company? (See Scope of Services Below.) Yes
2. When did this work take place? April 2023 - April 2024
3. What was the quality of the vendor’s services and goods to your District/Company? Very Good

4. Did the service and goods meet your expectations? Yes

5. Was the work completed in a timely manner? Yes

6. Would you recommend the vendor for future work within your District/company? Why or why not? Yes

7. What is your overall rating of Contractor's performance (requirements, schedule, and price) on contract being assessed?

Exceptional	Very Good	Satisfactory	Marginal	Unsatisfactory
	XXX			

**General Comments**


**Scope of Services:**

The successful respondent will have proven consulting excellence in all aspects of Employee Benefits, including but not limited to, the topics listed below. Experience providing Employee Benefits Consulting Services.

1. Benefits Strategic Design and Implementation.
2. Vendor Selection and Performance Management.
3. Budget Forecasting and Financial Analysis and Reporting for all Fully-Insured and Self-Funded Plans.
4. Insurance Program and Services Procurement.
5. Benefits-related Legislative Monitoring, Education, and Compliance.
6. Regulatory Compliance Assistance with specific focus on Nuances applicable to Governmental entities.
7. Competitive Benchmarking including Comparative Analysis to other District/Government Programs.
8. Employee Benefits Communication Plans and Print-ready Communication pieces.
9. Trending of health, Rx, and dental claims with suggestions for Risk Mitigation.
10. District and Employee Advocacy with Vendors.
11. Presentation Support including but not limited to Board Meetings, Insurance Committee Meetings, and Principal Meetings.
12. Contract Negotiation, Review and Management.
13. Specific knowledge of Compliance Requirements for Districts.
14. Assist the District with Affordable Care Act Compliance, Education and Implementation



# **EXHIBIT “C”**

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**CERTIFICATE OF INSURANCE**



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

5/21/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> <b>5G INSURANCE AGENCY</b> <b>3102 E Bus Hwy 83, Ste A</b> <b>Weslaco, TX 78596</b>	<b>CONTACT NAME:</b> <b>ANDREW GONZALEZ</b> <b>PHONE (A/C No. Ext):</b> <b>(956)969-1552</b>	<b>FAX (A/C, No):</b> <b>(956)973-0814</b>	
	<b>E-MAIL ADDRESS:</b> <b>andrew@5ginsagency.com</b>		
<b>INSURED</b> <b>ORTEGON INSURANCE AGENCY</b> <b>505 S TEXAS BLVD</b> <b>WESLACO, TX 78596</b> <b>9563736692</b>	<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
	<b>INSURER A : PROGRESSIVE COMMERCIAL</b>		<b>29203</b>
	<b>INSURER B : USLI</b>		<b>25895</b>
	<b>INSURER C : TEXAS MUTUAL</b>		<b>22945</b>
	<b>INSURER D :</b>		
	<b>INSURER E :</b>		
<b>TX 78596</b>		<b>INSURER F :</b>	


**COVERAGES****CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS			
<b>B</b>	<b>COMMERCIAL GENERAL LIABILITY</b>			<b>BP1607843</b>	<b>2/3/2024</b>	<b>2/3/2025</b>	EACH OCCURRENCE \$ <b>1,000,000</b>			
	<input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR	<input type="checkbox"/>	<input type="checkbox"/>				GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	DAMAGE TO RENTED PREMISES (Ea occurrence) \$ <b>100,000</b>		
<b>A</b>	<b>AUTOMOBILE LIABILITY</b>			<b>02065921</b>	<b>5/5/2024</b>	<b>5/5/2025</b>	MED EXP (Any one person) \$ <b>5,000</b>			
	<input type="checkbox"/> ANY AUTO	<input type="checkbox"/>	<input type="checkbox"/>				PERSONAL & ADV INJURY \$ <b>1,000,000</b>			
	<input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS	<input type="checkbox"/>	<input type="checkbox"/>				GENERAL AGGREGATE \$ <b>2,000,000</b>			
	<input type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	<input type="checkbox"/>	<input type="checkbox"/>				PRODUCTS - COMP/OP AGG \$ <b>2,000,000</b>			
	<b>UMBRELLA LIAB</b>						COMBINED SINGLE LIMIT (Ea accident) \$ <b>1,000,000</b>			
	<input type="checkbox"/> EXCESS LIAB	<input type="checkbox"/>	<input type="checkbox"/>				BODILY INJURY (Per person) \$ <b>1,000,000</b>			
	DED RETENTION \$						BODILY INJURY (Per accident) \$			
<b>C</b>	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b>			<b>0002056240</b>	<b>12/22/2023</b>	<b>12/22/2024</b>	PROPERTY DAMAGE (Per accident) \$ <b>100,000</b>			
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	<input type="checkbox"/>	<input type="checkbox"/>							PER STATUTE OTH-ER
	If yes, describe under DESCRIPTION OF OPERATIONS below	<b>Y / N</b> <b>N</b>	<b>N / A</b>				<b>X</b>	E.L. EACH ACCIDENT \$ <b>1,000,000</b>		
								E.L. DISEASE - EA EMPLOYEE \$ <b>1,000,000</b>		
							E.L. DISEASE - POLICY LIMIT \$ <b>1,000,000</b>			

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

**CERTIFICATE HOLDER****CANCELLATION**

<b>Hidalgo County</b>  <b>2802 S. Bus. Hwy 281</b> <b>Edinburg, TX. 78539</b>	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
--	--

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# CERTIFICATE OF INTERESTED PARTIES

FORM 1295

1 of 1

Complete Nos. 1 - 4 and 6 if there are interested parties.  
 Complete Nos. 1, 2, 3, 5, and 6 if there are no interested parties.

## OFFICE USE ONLY CERTIFICATION OF FILING

**1 Name of business entity filing form, and the city, state and country of the business entity's place of business.**

Ortegon Insurance Agency, LLC  
 Weslaco, TX United States

Certificate Number:  
 2024-1159244

Date Filed:  
 05/09/2024

Date Acknowledged:

**2 Name of governmental entity or state agency that is a party to the contract for which the form is being filed.**

Hidalgo County

**3 Provide the identification number used by the governmental entity or state agency to track or identify the contract, and provide a description of the services, goods, or other property to be provided under the contract.**

23-0342  
 Consulting Services for Self-Funded Health Plan

4	Name of Interested Party	City, State, Country (place of business)	Nature of interest (check applicable)	
			Controlling	Intermediary

**5 Check only if there is NO Interested Party.**

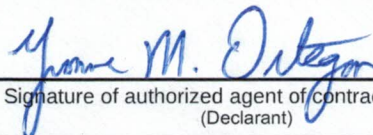
**6 UNSWORN DECLARATION**

My name is Yvonne M. Ortegon, and my date of birth is 01/16/1974.

My address is 505 S. Texas Blvd., Weslaco, TX, 78596, US.  
(street) (city) (state) (zip code) (country)

I declare under penalty of perjury that the foregoing is true and correct.

Executed in Hidalgo County, State of Texas, on the 9th day of May, 2024.  
(month) (year)

  
 Signature of authorized agent of contracting business entity  
(Declarant)

# CERTIFICATE OF INTERESTED PARTIES

FORM 1295

1 of 1

Complete Nos. 1 - 4 and 6 if there are interested parties.  
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Hidalgo County

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05/09/2024

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23-0342  
Consulting Services for Self-Funded Health Plan

4	Name of Interested Party	City, State, Country (place of business)	Nature of interest (check applicable)	
			Controlling	Intermediary

**5 Check only if there is NO Interested Party.**

**6 UNSWORN DECLARATION**

My name is \_\_\_\_\_, and my date of birth is \_\_\_\_\_.

My address is \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_.  
(street) (city) (state) (zip code) (country)

I declare under penalty of perjury that the foregoing is true and correct.

Executed in \_\_\_\_\_ County, State of \_\_\_\_\_, on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.  
(month) (year)

\_\_\_\_\_  
Signature of authorized agent of contracting business entity  
(Declarant)



## NOTICE

**TO: David Suarez**

**FROM: Cassandra Carr, Contract Specialist II**

**DATE: April 30, 2024**

**RE: 23-0342-02-14-08 Consulting Services for Self-Funded Health Plan**

We are pleased to inform you that the Purchasing Department has received the **(BAFO) Best and Final Offers** to the above mentioned project. Enclosed you will find the supporting documentation for your review and recommendation.

**Please select your recommendation to Award:**

<input type="checkbox"/>	Respondents	Original Proposal	Best and Final Offer
<input type="checkbox"/>	HUB International Texas, Inc.	\$72,000	\$69,600
<input checked="" type="checkbox"/>	Ortegon Insurance Agency, LLC	\$82,500	\$75,000

We would like to present your recommendation on the next Commissioners' Court Meeting; therefore, we need your response no later than **May 6, 2024 5:00 p.m.** Please submit your recommendation or any concerns to the Purchasing Department via email to: [cassandra.carr@co.hidalgo.tx.us](mailto:cassandra.carr@co.hidalgo.tx.us).

David Suarez      David Suarez      pct 1      5/2/24  
Name                      Signature                      Department                      Date

Should you have any questions or require further information please do not hesitate to call me at 956-318-2626, ext. 4858 Thank you for your attention and cooperation to this matter.



## NOTICE

**TO: Jorge Arcaute**

**FROM: Cassandra Carr, Contract Specialist II**

**DATE: April 30, 2024**

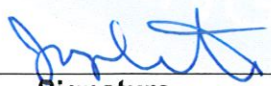
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Please select your recommendation to Award:

✓	Respondents	Original Proposal	Best and Final Offer
	HUB International Texas, Inc.	\$72,000	\$69,600
✓	Ortegon Insurance Agency, LLC	\$82,500	\$75,000

We would like to present your recommendation on the next Commissioners' Court Meeting; therefore, we need your response no later than **May 6, 2024 5:00 p.m.** Please submit your recommendation or any concerns to the Purchasing Department via email to: ([cassandra.carr@co.hidalgo.tx.us](mailto:cassandra.carr@co.hidalgo.tx.us)).

Jorge Arcaute  Precinct 3 5-2-24  
Name Signature Department Date

Should you have any questions or require further information please do not hesitate to call me at 956-318-2626, ext. 4858 Thank you for your attention and cooperation to this matter.



## NOTICE

**TO: Velinda Reyes**

**FROM: Cassandra Carr, Contract Specialist II**

**DATE: April 30, 2024**

**RE: 23-0342-02-14-08 Consulting Services for Self-Funded Health Plan**

We are pleased to inform you that the Purchasing Department has received the **(BAFO) Best and Final Offers** to the above mentioned project. Enclosed you will find the supporting documentation for your review and recommendation.

Please select your recommendation to Award:

<input type="checkbox"/>	Respondents	Original Proposal	Best and Final Offer
<input type="checkbox"/>	HUB International Texas, Inc.	\$72,000	\$69,600
<input checked="" type="checkbox"/>	Ortegon Insurance Agency, LLC	\$82,500	\$75,000

We would like to present your recommendation on the next Commissioners' Court Meeting; therefore, we need your response no later than **May 6, 2024 5:00 p.m.** Please submit your recommendation or any concerns to the Purchasing Department via email to: [cassandra.carr@co.hidalgo.tx.us](mailto:cassandra.carr@co.hidalgo.tx.us).

Velinda Reyes      Velinda Reyes      Pct 4      5-7-24  
Name                      Signature                      Department                      Date

Should you have any questions or require further information please do not hesitate to call me at 956-318-2626, ext. 4858 Thank you for your attention and cooperation to this matter.

# Hidalgo County Purchasing Department

## Award Recommendation Results

**Project No.:** RFP-23-0342-05-14

**Project Description:** Consulting Services for Self Funded Health Plan

	HUB International Texas, Inc.	Ortegon Insurance Agency, LLC
Evaluator No.1	0	1
Evaluator No.2	No Response	-
Evaluator No.3	0	1
Evaluator No.4	0	1
Evaluator No.5	No Response	-
<b>Total</b>		<b>3</b>

0 = NO  
1 = YES



May 14, 2024

Yvonne Ortegon, CEO/Owner  
Ortegon Insurance Agency, LLC  
505 S. Texas Blvd.  
Weslaco, Texas 78596

Delivered via email: [yvonne@ortegonagency.com](mailto:yvonne@ortegonagency.com)

Term: May 14, 2024 – May 13, 2025

**Re: NOTICE OF AWARD  
RFP-23-0342  
Consulting Services for Self-Funded Health Plan for Human Resources**

Dear Ms. Ortegon,

This letter is to notify you that pursuant to Commissioners Court action taken on May 14, 2024, under Agenda Item No. 95315, the aforementioned project was awarded to Ortegon Insurance Agency, LLC.

Following this email, I will forward you the Contract of Service to be signed electronically. Please keep an eye out for an email from Adobe Sign. After the Contract of Service is fully executed, you'll automatically receive a copy for your records.

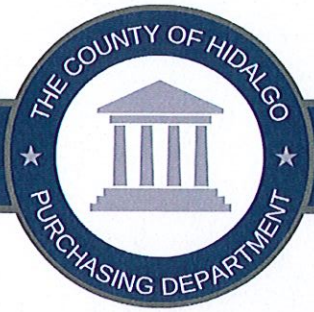
Moving forward, this award will be referenced by Contract No. C-23-0342-05-14.

Hidalgo County Purchasing Department appreciates your business. If any further assistance is required, please do not hesitate to call Cassandra Carr, Contract Specialist II at (956) 318-2626, extension 4858.

Sincerely,

A handwritten signature in blue ink that reads "Ignacio Amezcua".

Ignacio Amezcua, MBA, CTCM,CTCD  
Hidalgo County Purchasing Director



May 14, 2024

Ms. Amy Kirby  
Gallagher Benefit Services, Inc.  
9442 N Capital of Texas Highway  
Building 1, Suite 950  
Austin, TX 78759

Delivered via email: [amy\\_kirby@ajg.com](mailto:amy_kirby@ajg.com)

**Re: NOTICE OF NON-AWARD  
RFP-23-0342  
Consulting Services for Self-Funded Health Plan for Human Resources**

Dear Ms. Kirby,

Hidalgo County would like to take this opportunity to appreciate your efforts in participating in the above mentioned solicitation that opened on February 14, 2024.

We regret to inform you that pursuant to Commissioners Court action taken on May 14, 2024, under Agenda Item No. 95315, the aforementioned project was **not** awarded to Gallagher Benefit Services, Inc.

We thank you again for your interest and engagement in this solicitation, and look forward to your future participation in projects that are deemed suitable by Gallagher Benefit Services, Inc.

Sincerely,

A handwritten signature in blue ink that reads "Ignacio Amezcua".

Ignacio Amezcua, MBA, CTCM, CTCD  
Hidalgo County Purchasing Director



May 14, 2024

Mr. Randy McGraw  
Sr. Vice President  
HUB International Texas, Inc.  
3221 Collinsworth  
Fort Worth, TX 76107

Delivered via email: [randy.mcgraw@hubinternational.com](mailto:randy.mcgraw@hubinternational.com)

**Re: NOTICE OF NON-AWARD  
RFP-23-0342  
Consulting Services for Self-Funded Health Plan for Human Resources**

Dear Mr. McGraw,

Hidalgo County would like to take this opportunity to appreciate your efforts in participating in the above mentioned solicitation that opened on February 14, 2024.

We regret to inform you that pursuant to Commissioners Court action taken on May 14, 2024, under Agenda Item No. 95315, the aforementioned project was **not** awarded to HUB International Texas, Inc.

We thank you again for your interest and engagement in this solicitation, and look forward to your future participation in projects that are deemed suitable by HUB International Texas, Inc.

Sincerely,

A handwritten signature in blue ink that reads "Ignacio Amezcua".

Ignacio Amezcua, MBA, CTCM, CTCD  
Hidalgo County Purchasing Director



May 14, 2024

Ms. Ruth Garza  
Valley Risk Consulting  
1200 Fresno  
McAllen, TX 78501

Delivered via email: [ruth@vrctx.com](mailto:ruth@vrctx.com)

**Re: NOTICE OF NON-AWARD  
RFP-23-0342  
Consulting Services for Self-Funded Health Plan for Human Resources**

Dear Ms. Kirby,

Hidalgo County would like to take this opportunity to appreciate your efforts in participating in the above mentioned solicitation that opened on February 14, 2024.

We regret to inform you that pursuant to Commissioners Court action taken on May 14, 2024, under Agenda Item No. 95315, the aforementioned project was **not** awarded to Valley Risk Consulting.

We thank you again for your interest and engagement in this solicitation, and look forward to your future participation in projects that are deemed suitable by Valley Risk Consulting.

Sincerely,

A handwritten signature in blue ink, appearing to read "Ignacio Amezcua".

Ignacio Amezcua, MBA, CTCM, CTCD  
Hidalgo County Purchasing Director

5/10/24, 2:40 PM

COUNTY OF HIDALGO, TEXAS Mail - Re: 23-0342 Consulting Services for Self-Funded Health Plan



Cassandra Carr <cassandra.carr@co.hidalgo.tx.us>

---

## Re: 23-0342 Consulting Services for Self-Funded Health Plan

1 message

---

**Michelle Lopez** <michelle.lopez@da.co.hidalgo.tx.us>

Fri, May 10, 2024 at 2:32 PM

To: Cassandra Carr <cassandra.carr@co.hidalgo.tx.us>

Cc: Robert Vina <robert.vina@da.co.hidalgo.tx.us>, "Victor M. Garza" <victor.garza@da.co.hidalgo.tx.us>, Dina Trevino <dina.trevino@co.hidalgo.tx.us>, Olga Garza <olga.garza@co.hidalgo.tx.us>

Good Afternoon Ms. Carr,

This office has reviewed C-23-0342-05-14, Contract for Service with Ortegon Insurance Agency, LLC and at this time approves as to form.

Thank you,

Michelle Lopez  
Assistant District Attorney  
Civil Litigation Division












# C-23-0342-05-14 Service Agreement


Final Audit Report

2024-05-17

Created:	2024-05-15
By:	Cassandra Carr (cassandra.carr@co.hidalgo.tx.us)
Status:	Signed
Transaction ID:	CBJCHBCAABAAeE8DyrS5I8gLiobmNke8kT7XPyssPpOg

## "C-23-0342-05-14 Service Agreement" History


-  Document created by Cassandra Carr (cassandra.carr@co.hidalgo.tx.us)  
2024-05-15 - 7:27:09 PM GMT
-  Document emailed to Yvonne Ortegon (yvonne@ortegonagency.com) for signature  
2024-05-15 - 7:29:54 PM GMT
-  Email viewed by Yvonne Ortegon (yvonne@ortegonagency.com)  
2024-05-16 - 4:51:17 PM GMT
-  Document e-signed by Yvonne Ortegon (yvonne@ortegonagency.com)  
Signature Date: 2024-05-16 - 4:54:45 PM GMT - Time Source: server
-  Document emailed to Monica Salinas (monica.salinas@co.hidalgo.tx.us) for approval  
2024-05-16 - 4:54:48 PM GMT
-  Email viewed by Monica Salinas (monica.salinas@co.hidalgo.tx.us)  
2024-05-16 - 5:28:52 PM GMT
-  Document approved by Monica Salinas (monica.salinas@co.hidalgo.tx.us)  
Approval Date: 2024-05-16 - 5:29:29 PM GMT - Time Source: server
-  Document emailed to Michelle Lopez (michelle.lopez@da.co.hidalgo.tx.us) for signature  
2024-05-16 - 5:29:32 PM GMT
-  Email viewed by Michelle Lopez (michelle.lopez@da.co.hidalgo.tx.us)  
2024-05-16 - 5:35:12 PM GMT
-  Document e-signed by Michelle Lopez (michelle.lopez@da.co.hidalgo.tx.us)  
Signature Date: 2024-05-16 - 5:35:24 PM GMT - Time Source: server
-  Document emailed to Richard F. Cortez (countyjudge.contracts@co.hidalgo.tx.us) for signature  
2024-05-16 - 5:35:27 PM GMT

 Email viewed by Richard F. Cortez (countyjudge.contracts@co.hidalgo.tx.us)


2024-05-16 - 6:22:37 PM GMT

 Document e-signed by Richard F. Cortez (countyjudge.contracts@co.hidalgo.tx.us)

Signature Date: 2024-05-16 - 6:23:10 PM GMT - Time Source: server

 Document emailed to Daniela Garza (daniela.garza@co.hidalgo.tx.us) for approval


2024-05-16 - 6:23:13 PM GMT

 Email viewed by Daniela Garza (daniela.garza@co.hidalgo.tx.us)


2024-05-16 - 6:43:11 PM GMT

 Document approved by Daniela Garza (daniela.garza@co.hidalgo.tx.us)

Approval Date: 2024-05-17 - 3:55:44 PM GMT - Time Source: server

 Document emailed to Arturo Guajardo, Jr. (arturo.guajardo@co.hidalgo.tx.us) for signature


2024-05-17 - 3:55:48 PM GMT

 Email viewed by Arturo Guajardo, Jr. (arturo.guajardo@co.hidalgo.tx.us)

2024-05-17 - 4:20:08 PM GMT

 Document e-signed by Arturo Guajardo, Jr. (arturo.guajardo@co.hidalgo.tx.us)

Signature Date: 2024-05-17 - 4:21:29 PM GMT - Time Source: server

 Document emailed to Daniela E. Garza (daniela.garza@co.hidalgo.tx.us) for approval

2024-05-17 - 4:21:32 PM GMT

 Email viewed by Daniela E. Garza (daniela.garza@co.hidalgo.tx.us)

2024-05-17 - 6:07:00 PM GMT

 Document approved by Daniela E. Garza (daniela.garza@co.hidalgo.tx.us)

Approval Date: 2024-05-17 - 6:07:38 PM GMT - Time Source: server

 Agreement completed.

2024-05-17 - 6:07:38 PM GMT

AI-95315

Purchasing Department 22. A. 1.

**CC REGULAR AGENDA SPECIAL  
MTG**

**Human Resources**

**Meeting Date:** 05/14/2024

**Submitted For:** Ignacio Amezcua,  
PURCHASING DEPT.

**Submitted By:** Cassandra Carr

**Department:** PURCHASING DEPT.

---

**CAPTION**

Requesting approval of the best and final negotiated offer meeting all requirements and specifications for "Consulting Services for Self-Funded Health Plan" (C-23-0342-05-14) with Ortegon Insurance Agency, LLC.

**BACKGROUND**

Project No. 23-0342  
Scoring/Ranking via AI-94825

---

**Fiscal Impact**

**CALENDAR YEAR:** 2024  
**FUNDS AVAILABLE Y/N?:**

**ACCT. #:**  
**MATCHING FUNDS Y/N?:**

**BUDGETARY IMPACT:**

No Fiscal Impact at this time.

---

**Attachments**

1295 & Acknowledge  
Service Agreement  
Legal Approval

---

**Form Review**

<b>Inbox</b>	<b>Reviewed By</b>	<b>Date</b>
Purchasing / Internal	Ignacio Amezcua	05/10/2024 04:07 PM
Budget & Management	Veronica Ortiz	05/10/2024 04:33 PM
Final Approval	Monica Salinas	05/10/2024 06:10 PM
Form Started By: Cassandra Carr		Started On: 05/10/2024 10:25 AM
Final Approval Date: 05/10/2024		

(ARPA-23-124-327).

OK  
P2/4

**E. Budget Appropriations:**

- 1. AI-95333 Pct 2 Rd Maint (1200):  
Approval of 2024 appropriation of funds from Road & Bridge fund balance in the amount of \$300,000.00 to fund daily operations.
- 2. AI-95298 Pct. 4 Road & Bridge (1200):  
Approval of appropriation of funds from the Road & Bridge unassigned fund balance into Pct.4 Highway Safety Improvement Program and Rd. Maint. in the amount of \$281,460.27 to fund operating expenses.

P4/2

**22. Purchasing Department - Notes:**

A. FOR ANY CONTRACT(S) AWARDED AND APPROVED UNDER THIS AGENDA, EXECUTED COPIES OF THE CONTRACT(S) WILL BE AVAILABLE ON THE COUNTY INTRA-NET WEBSITE AND WILL BE FORWARDED VIA E-MAIL, FAX OR HAND DELIVERED TO HIDALGO COUNTY AUDITOR'S OFFICE.

B. ANY AND ALL REQUESTS FOR PAYMENT(S) APPROVED WILL BE SUBJECT TO COUNTY AUDITORS PROCESSING PROCEDURES INCLUDING AUTHORITY FOR COUNTY TREASURER TO ISSUE PAYMENT(S)/CHECK(S).

**APPROVED**

OK  
P2/4  
Comm. Files  
Abstain

**A. Human Resources:**

- 1. AI-95315 Requesting approval of the best and final negotiated offer meeting all requirements and specifications for "Consulting Services for Self-Funded Health Plan" (C-23-0342-05-14) with Ortegon Insurance Agency, LLC.

**B. Emergency Management**

- 1. AI-95270 Requesting approval to purchase one (1) 2024 Chevy Silverado 2500 through HC's membership with The Interlocal Purchasing System (TIPS-USA Contract No. 210907), from Lake Country Chevrolet, in the total amount of \$50,083.25

**C. Pct. 3**

- 1. AI-95186 A. Presentation of the scoring grid for the purpose of ranking by HCCC of graded vendors submissions with the recommendation by the evaluation committee members for "Lease of Land for Solar Farming" (RFP-23-0232-11-29-04).

OK  
P4/2

	Ideal Solar LLC	Texas Energy Consultants / Titus Low Carbon Ventures LLC
Evaluator No. 1	1	2
Evaluator No. 2	1	2
Evaluator No. 3	1	2
Total	3	6
Rank		

- B. Requesting approval by Commissioner's Court in order to proceed with negotiating with the No. 1 ranked vendor Ideal Solar to finalize an agreement for "Lease of Land for Solar Farming".

**D. Pct. 4**

- 1. AI-95238 A. Requesting approval of exemption from competitive bidding requirements under TxLGC 262.024 (a)(7) (C), an item that can be obtained from only one source, including: electric power, gas, water and other utility services.

OK  
P4/2