



**REQUEST FOR QUALIFICATIONS**

**RFQ NO. 2024-05-06**

**AGENT OF RECORD**

## **I. GENERAL INFORMATION:**

City of Alamo (City) is seeking written proposals from qualified insurance agents to serve as the Agent of Record for insurance services including, health, dental, life, AD&D and voluntary/supplemental insurances. This is to include providing the City of Alamo with recommendations on related products to offer our employees, providing service and maintenance of those products and related claims and education regarding benefits and related processes and assistance to City of Alamo employees related to the group benefits, process/assist with all claims (include wellness, accidental, hospital, etc.), provide and coordinate annual health fair, coordinate open enrollment, file electronic 1095's, administer COBRA, assist with monthly billing and process new hires/term employees.

The Agent of Record Contract will be for a period of one (1) year from day of award with the provision to extend the contract an additional two (2) years (with one-year intervals) at the City's discretion.

The City of Alamo must receive one (1) Original hard copy of your submission two (2) copies and one (1) electronic pdf copy on a USB flash drive by **3:00 P.M. on Thursday, June 6, 2024**. Proposals must be in a sealed envelope, clearly marked "**AGENT OF RECORD RFQ NO. 2024-05-06**" and should be delivered and received by mail or in person to the following address:

**City of Alamo  
Attention: Adela Perez, Purchasing Agent  
420 N. Tower Rd.  
Alamo, Texas 78516**

Proposals should be prepared simply and electronically, providing a straightforward, concise description of proposer's capabilities to satisfy the requirements of the RFQ. Emphasis should be on completeness and clarity of the content. In addition, some of those responding may be placed on a short list to make a brief 5-minute presentation based on their submission to the City Commission during a City Commission meeting.

Proposals shall be firm for a period of ninety (90) days after the closing date. Each responding proposer may withdraw their proposal if it has not been accepted within ninety (90) days from the RFQ closing date.

The award of this contract will be made by the City on the basis of the proposal which, in the City's sole and absolute judgment, will best serve the best interests and needs of the City. The City reserves the right to accept or reject any or all the proposals, and waive any informalities and irregularities in said proposals.

All proposers must provide the information requested in Section III, Proposal Submission Requirements. Failure to respond to any or all requested information may result in disqualification by the City.

Questions, interpretations or clarification of this RFQ must be requested in writing. All questions should be directed to **Adela Perez, Purchasing Agent**. All questions are due by **4:00 P.M. on May 31, 2024**. Please send questions to [aperez@alamotexas.org](mailto:aperez@alamotexas.org).

**II. SCHEDULE OF EVENTS/DATES:**

<b>ACTION</b>	<b>DATE</b>
Issue RFQ	May 22, 2024
Final Questions Due	May 31, 2024
Proposals Due	June 6, 2024
Proposal Review	June 14, 2024
Notice of Intent to Award	June 18, 2024

**III. PROPOSAL SUBMISSION REQUIREMENTS:**

The proposing agent shall be responsible for preparing an effective, clear and concise proposal. The proposal must include the following minimum information:

1. Cover letter addressed to Adela Perez, Purchasing Agent and signed by a person legally authorized to bind the applicant to its proposal. The cover letter must include name of agency, broker and/or agent, address, telephone and fax numbers of the agency and email address of the person(s) who are authorized to represent the proposer. The letter should also include that the agent has made no agreements with any company that places it as the sole agent for such company.
2. Name(s), titles, and qualifications of proposed broker(s)/agent(s) with experience in municipal accounts of similar size and scope of service.
3. Name(s), titles, and qualifications of proposed key personnel with experience in municipal accounts of similar size and scope of service.
4. Articulate plan and ability to provide service delivery and support to meet the following scope of work, including examples of reports, if applicable;
  - a. Proximity to the City of Alamo.
  - b. Routine and emergent consultation relating to insurance-related issues.
  - c. Philosophy regarding addressing customer/client questions and needs.
  - d. Provide consultation in the area of insurance products and recommendations.

**IV. MINIMUM QUALIFICATIONS:**

1. Primary servicing agent shall reside within 30 miles of City of Alamo.
2. Any proposer must be licensed to provide insurance services in the State of Texas.
3. Demonstrated experience in servicing public sector accounts of equal size, complexity, and scope.

**V. SELECTION PROCESS:**

1. Each proposal received will be evaluated to determine if it meets the stated requirements. Failure to meet these requirements will be cause for eliminating the proposal from further consideration.

2. The City reserves the right to reject any and all proposals, to accept or reject all parts of the proposal, and to be the sole judge of the suitability of the proposals offered.
3. Proposals will be evaluated generally on the following criteria, which is neither weighted nor prioritized:
  - a. Qualifications of the agency.
  - b. Ability to meet scope of work and service required.
  - c. Proximity to the City.
4. All submittals in response to this RFQ are public records and available for inspection and copying upon request. Any portions of the RFQ submittal marked as confidential will not be made public without consent of the consultant prior to the award of the contract.

#### **VI. ADDITIONAL INSTRUCTIONS, NOTIFICATIONS AND INFORMATION:**

1. **No Gratuities** – Respondents will not offer any gratuities, favors, or anything of monetary value to any official or employee of the City of Alamo for the purpose of influencing this selection. Any attempt by a Respondent to influence the selection process by any means other than disclosure of qualifications and credentials through the proper channels, will be grounds for exclusion from the selection process. Accordingly, contact with members of the City Staff, which are outside of the established process should not be initiated.
2. **All Information True** – By submitting a response, Respondents represent and warrant to the City that all information provided in the response submitted shall be true, correct and complete. Respondents who provide false, misleading or incomplete information, whether intentional or not, in any of the documents presented to the City of Alamo for consideration in the selection process may be excluded.

#### **VII. CONFLICT OF INTEREST:**

Bidders are advised that they must be in compliance with the below mentioned law:

Chapter 176 of the Texas Local Government Code:

Effective January 1, 2006, Chapter 176 of the Texas Local Government Code requires that any vendor or person considering doing business with a local government entity disclose in the Questionnaire Form CIQ, the vendor or person's affiliation or business relationship that might cause a conflict of interest with a local government entity. By law, this questionnaire must be filed with the records administrator of the City of Alamo no later than the 7<sup>th</sup> business day after the date the person becomes aware of facts that require the statement to be filed. See Section 176.006, Local Government Code. A Person commits an offense if the person violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.

For more information or to obtain Questionnaire CIQ, go to the Texas Ethics Commission web page at [www.ethics.state.tx.us/forms/CIQ.pdf](http://www.ethics.state.tx.us/forms/CIQ.pdf). If you have any questions about compliance, please consult with your own legal counsel. Compliance is the individual responsibility of each person or agent of a person who is subject to the filing requirements.

### **VIII. TERMS AND CONDITIONS:**

1. Term of Agreement: The City anticipates selecting the Agent of Record to commence services as soon as reasonably appropriate. A contract may be negotiated for a one-year period with an option to renew for an additional two years on a year-by-year basis.
2. Withdrawal of RFQ: Proposals may be withdrawn before the RFQ submittal deadline by submitting a written request to Adela Perez, Purchasing Agent. Re-Submittal before the RFQ submittal deadline can be made; however, they may not be re-submitted after the deadline.
3. RFQ Costs: All costs incurred in the preparation and presentation of the RFQ shall be the responsibility of the responding party to the RFQ. All documents submitted as part of the RFQ will become property of the City. Requests for specific material to be returned will be considered. Any material submitted that is confidential must be clearly marked as such.
4. City of Alamo Contacts: The designated individual responsible for coordination of the RFQ is Adela Perez, Purchasing Agent. Any questions relating to this RFQ should be directed to [aperez@alamotexas.org](mailto:aperez@alamotexas.org) in writing only.