



ADDENDUM II
RFQ FOR AGENT OF RECORD
JUNE 22, 2018

This addendum is separated into two sections; (I) questions and answers, (II) Additional attachments. All parties shall be responsible for reading this entire addendum. The failure to list an item or items in all affected sections of this addendum does not relieve any party affected from performing as per instructions, providing that the information is set forth one time any place in this addendum. The addendum will form a part of the resulting contract document. All other conditions of this RFQ remain unchanged.

SECTION I. QUESTIONS & ANSWERS

1. **Question:** How many employees do you have and how many on enrolled in benefits?
Answer: 34 employees all enrolled in benefits

2. **Question:** Will the agency consider contracting with two (2) agents? For example, if a proposal is submitted for the Supplemental Plans only will the agency accept the proposal and evaluate?
Answer: Yes

3. **Question:** What is the anticipated award date?
Answer: 7/23/2018 (tentative)

4. **Question:** Is the renewal date for all employee benefits Jan. 1, of each year?
Answer: Yes

5. **Question:** Is enrollment conducted via the intranet or internet or paper?
Answer: Paper forms are completed and then entered online for each carrier by our broker

6. **Question:** Please provide a list of all current benefit carriers with monthly premium rates.
Answer: The health insurance carrier is Blue CROSS Blue Shield, dental is dental select Vision is Avesis, Life/ADD, STD AND LTD are Mutual of Omaha, Supplemental products are AFLAC The selected agent of record will received a complete census with all the monthly premium rates.

7. **Question:** How many agency staff members manage employee benefits?
Answer: Internal control HR and Fiscal review (3)

8. **Question:** Please provide the name of the current Agent of Record?
Answer: SWBC

9. **Question:** Does the agency desire a Total Compensation Benefit Statement (including Paid Time Off, Retirement, etc.)?

Answer: Yes

10. **Question:** Please breakdown the number of total lives for each benefit program.

Answer: Medical 36 (2- Cobra included in this total)

Dental36 (2- Cobra included in this total)

Vision 34

Life/ADD34

Voluntary Life/ADD 15

STD 34

LTD 34

11. **Question:** How will the Agent of Record be compensated?

Answer: It is expected that the agent will received compensation directly from the carriers.

12. **Question:** Is the current Agent of Record contract in an extension period?

Answer: No

13. **Question:** Does the agency have a secured "https" site for employee benefits?

Answer: No

*****END OF QUESTIONS RECEIVED*****

SECTION II. ATTACHMENTS

ATTACHMENT M

POWER POINT

*****END OF ATTACHMENTS *****

Request for Qualifications(RFQ)
For
Agent of Record
Release date June 11, 2018



Timeline

- June 11, 2018 Release of Request for Qualification
- June 14, 2018 Bidders conference (non-mandatory)
- June 20, 2018 Final Date for Questions (5:00 p.m.)
- June 22, 2018 Respondent's Q&A posted (Website & ESBD)
- July 10, 2018 Response deadline.
- Contract Start date-Award Date

Background

The Alamo Workforce Development, Inc., d/b/a Workforce Solutions Alamo (WSA) is incorporated as a private, non-profit organization in the State of Texas and maintains a federal tax exemption status as a 501(c)3 organization.

WSA serves as the governing board for the regional workforce system, a network of service providers and contractors that brings people and jobs together.

We represent the taxpayers of the Alamo Workforce Development Area.

Services Solicited

This Request for Qualifications is to obtain an Agent of Record services for fringe benefits related to WSA's employees. Respondents have the option of providing the services requested related to a combination of the plan benefits or for all the requested benefits. WSA Professional (staff) include thirty-six (36) employees. A range of insurance and other benefits are provided. The following benefits are currently provided:

- Health insurance
- Wellness plan with health insurance provider
- Dental insurance
- Vision
- Life insurance
- ADD
- Short/Long-term disability
- Supplemental plans:
 - Accident,
 - Cancer Care
 - Hospital Confinement
 - Specific event
 - Term Life

Services Solicited

WSA is seeking to have an agreement with a firm(s) or individual(s) that will perform an extensive review of our current plan and make recommendations on the health insurance and employee benefits. The firm(s) or individual(s) will test the market by preparing competitive quotes.

The Agent of Record must provide a full range of services. Specific responsibilities include but are not limited to:

- **Plan for January 1, 2019 renewal**
- Plan for a Flexible Spending Account
- Solicit, evaluate, and negotiate plan proposals and rate quotes from existing renewals or recommendations to alternate insurance carriers for annual renewal.
- Provide an analysis and recommendations of benefit plan designs, cost savings and enhancement options.
- Assist with implementation of changes.

Services Solicited

- Conduct annual enrollment.
- Prepare insurance application.
- Assist with resolution of claims.
- Conduct periodic plan review and provide plan design recommendations which will result in more effective benefits and cost saving opportunities with annual budget analysis.
- Prepare comprehensive Employee Benefit Guide and other educational material, as requested.
- Coordinate with Section 125 Cafeteria plan, HIPAA, Healthcare Reform issues.
- Assist with the development and design of year-around educational and informational materials, meetings and other initiations to increase employee's awareness and understanding of their benefits.
- Provide and administer annual employee survey(s) to determine areas of employee concerns and/or needs for improvement with existing benefits.
- Hold two employee direct contact meetings to assist employees with benefit decisions.
- Provide analysis and recommendations on new benefit plans on the market.
- Can provide annual benefits statement;
- Long Term Care Insurance
- Ability to facilitate online enrollments
- Types if any of COBRA administration services offered
- Role for post open enrollment new hires and salary adjustments

Items to be address in RFP(s)

- Proposer must submit (1) original with executed forms and certificates, plus one (1) exact copy and (1) electronic copy on flash drive for evaluation purposes.
 - Electronic copy should be user friendly so that the files can be easily accessed by ~~external~~ internal evaluators.
- **Any differences between the original and the electronic copy are the liability of the respondent.**
- **Original proposal must be clearly marked “Original” on the cover sheet and bear original signatures.**



5.3 ORDER OF RESPONSE CONTENT

Responses must follow the format and must be clearly labeled in the exact order shown below. Compile the response in the following order:

- A - Cover Sheet
- B – Response Narrative
- C - Certification of Legal and Signatory Authority
- D - Certification Regarding Lobbying, Debarment and Drug-Free Workplace
- E - Certification of Non-Discrimination & Equal Opportunity
- F - Certification Regarding Texas Corporate Franchise Tax
- G - Certification Regarding State Assessment Certification
- H - Certification Undocumented Worker Certification
- I - Certification Regarding Conflict of Interest
- J - Certification of Proposer
- K – Resumes, W-9, and Certification of Historically Under-utilized Business, if applicable (other materials requested or referred to in the narrative should be labeled and included here, e.g. licenses)
- L – References
- M - List of number of employer plans and current companies that may submit quotes (for our group).

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Employer Size	Number of Current Clients	Remarks
1-50		
51-50		
151>		

Heath Insurance	Number of Plans with Carrier	Remarks
Blue Cross		
Humana		



Proposal Evaluation Criteria

- Statement of Qualifications, and Credentials.....25 pts
- Quality of Proposal30 pts
- Demonstrated Ability/References.....25 pts
- Historically Underutilized Business (HUB) / Bonus.....5 pts

Procurement Contact

- Martha Aguilar
- Email address: contractsandprocurement@wsalamo.org
- Phone number: 210-581-1062

Deadline for Questions	June 20, 2018 @5:00 p.m.
Q&A posted on Website and ESBD	June 22, 2018

Questions?