

**SAN BENITO CONSOLIDATED INDEPENDENT SCHOOL DISTRICT  
REQUEST FOR QUALIFICATIONS  
RFQ-0313-IAVP**

**FOR:** Insurance Agent-Voluntary Plans

**DESCRIPTION:** San Benito CISD is seeking qualifications of licensed insurance agents, to serve as the agent for employees of the San Benito CISD seeking to purchase voluntary insurance products as a part of the districts IRS Section 125 Cafeteria Plan. The agent will not be responsible for the selection of products as those have already been selected by the district through a separate bidding process.

**PROPOSAL DEADLINE:** Friday, March 1<sup>st</sup>, 2013  
2:00 p.m

Proposals for the above will be received by the San Benito Consolidated Independent School District (SBCISD) ATTN: Ms. Emma McCall, Business Manager at the Administration Building located at 240 North Crockett Street, San Benito, Texas 78586.

Copies of the Request for Proposals are available at the office of Mr. Adrian Garcia, Purchasing Agent, SBCISD, 240 North Crockett Street, San Benito, Texas 78586, phone (956) 361-6390, or at the San Benito CISD web site: <http://purchasing.sbcisd.net/category/bids/>

This is reserved, as the interest of the SBCISD may require, to reject any or all qualifications proposals, and to waive any formalities in proposals received and accept the proposal most advantageous to the SBCISD.

Ms. Emma McCall  
Business Manager  
San Benito CISD

**SAN BENITO CONSOLIDATED INDEPENDENT SCHOOL DISTRICT  
GENERAL REQUIREMENTS AND CONDITIONS**

**BID ITEM:** Insurance Agent-Voluntary Plans

**BID NO.:** RFQ-0313-IAVP

**A. OPENING SEALED BIDS:**

- (1) All sealed bids shall be received in the office of the Business Department, 240 N. Crockett, San Benito, Texas, 78586, where they will be opened publicly on the date and at the time as advertised (Refer to Invitation to Bid). Bids shall be opened by the administrators of the Purchasing and Business Office; at least two administrators shall be present at the bid opening.
- (2) The closing time for sealed bids is final. Bids received after the closing time will not be opened or considered. (See Invitation to Bid).
- (3) Submitted bids are final and may not be altered. Vendors may, however, submit sealed alternative bids before the closing time to substitute prices on their formal bid, in which case only the substitute prices on their formal bid will be considered.
- (4) No bid can be withdrawn after opening without approval of the administrator of the Business Department based upon a written acceptable reason.

**B. BID QUOTATION FORM:**

- (1) Bids should be submitted in a sealed envelope. Each bid shall be placed in a separate envelope, sealed and properly identified with the bid title, number and the time and date to be opened.
- (2) Bids must show the full name and address of the bidder if different than name and address shown on the bid request. Failure to manually sign bid will disqualify it. Person signing bid should show title of authority to bind their firm to a contract.
- (3) Bid cannot be altered or amended after opening time. Any alternations made before opening time must be signed by the bidder or his agent. Withdrawal of a bid, or failure to honor a bid, may result in the deletion of the company from future bid requests.
- (4) Prices should be F.O.B. Destination, inside delivery. If otherwise, they must show the exact or estimated cost to deliver.
- (5) **Delivery:** Bid must show the number of days required to deliver the articles to the specified location under normal conditions after receipt of an order. Failure to state the delivery time obligates the bidder to make delivery in 14 calendar days. Tailgate delivery to school locations are not acceptable. Delivery shall be made during normal working hours unless prior approval has been obtained from the District.
- (6) **Installation:** The successful bidder shall provide the following services and requirements at no additional cost above the initial bid price on machinery or furniture: provide transportation of the items to the building, locating the items in the proper location within the building, uncrating, completing assembly and adjustment by a trained installation mechanic and removing all debris. Machinery is to be complete and made ready for electrical and/or fluid service connection by the School District. After connection, the machine is ready, started, checked and malfunction for the equipment is corrected. All materials, equipment and labor to place machinery in top operating condition or to fully assemble furniture must be provided.
- (7) Unit price on quantity specified must be bid, extended and total shown. In case of errors in extension, unit price shall govern.
- (8) Bid prices must be firm for acceptance 60 days from bid opening date.
- (9) The District is exempt from Federal Excise Tax, State Tax and Local Tax. Tax is not included in bid. If it is determined that tax was included in the bid, it will not be included in the tabulation or any awards. Tax exemption certificated will be furnished upon request.

**C. ITEMS BID INSTRUCTION:**

- (1) Any catalog, brand name or manufacturer's reference or specifications used in the bid request is descriptive not restrictive. It is intended to indicate type and quality desired. Bids on brands of like nature and quality will be considered. If bidding on other than reference specifications, bids must show manufacturer, brand, model, etc. of article offered. If other than brand(s) specified is offered, complete descriptive information of each article being bid should be included with the bid. If bidder takes no exception to specifications of reference data, he will be required to furnish brand names, models, etc. as specified.
- (2) Samples, when requested, must be furnished at no cost to the District. If not destroyed in examination, they will be returned to the bidder upon request at his expense. Each sample, when requested, should be marked with bidders name and item number on the bid. Bid must not be enclosed in or attached to sample.
- (3) All items bid must be new, in excellent condition, including containers suitable for shipment and storage, unless, otherwise indicated on the bid.

**D. BID PROPOSALS/APPROVAL:**

- (1) All accepted bids will be tabulated and awarded as provided under Approval/Awarding of Bids; all contracts will be awarded in accordance with Texas Education Code 44.031 (b).
- (2) All contracts of personal property in excess of \$50,000.00 shall require Board approval.
- (3) After the bids have been opened and tabulated they will be available for those interested to copy or study; they shall not, however, be removed from the Purchasing Department.
- (4) If no acceptable bids are received, the proposed acquisition will be re-advertised seeking an acceptable bid.
- (5) The District reserves the right to accept or reject all or any bid, waive minor technicalities and award the bid to best serve the interest of the District.
- (6) The District reserves the right to purchase additional articles as listed on this bid subject to verification of the same or lower prices and conditions as bid.
- (7) All items quoted must conform to appropriate Local, State and Federal ordinances, statutes and regulations governing the sale and utilization of the items.

**E. ON ALL BUILDING OR CONSTRUCTION CONTRACTS:**

The district shall require the contractor to certify in writing that he provides workers' compensation insurance coverage for each employee of the contractor employed on the public project. And the district shall require from the general contractor a certificate of workers compensation coverage of his subcontractors, if any, relating to coverage of his subcontractor's employees

**F. VENUE:**

Both parties agree that venue for any litigation arising from this contract shall be in Cameron County, Texas.

**G. GRATUITIES:**

The Buyer may, by written notice to the Seller, cancel this contract without liability to Seller if it is determined by Buyer that gratuities, in the form of entertainment, gifts, or otherwise, were offered or given by the Seller, or any agent, or representative of the Seller, to any officer or employee of the School District with a view toward securing a contract or securing favorable treatment with respect to the awarding or amending or the making or any determinations with respect to the performing of such contract. In the event this contract is canceled by Buyer pursuant to this provision, Buyer shall be entitled, in addition to any other rights and remedies, to recover or withhold the amount of the cost incurred by Seller in providing such gratuities.

**SPECIFIC INSTRUCTIONS IN THE SPECIFICATION SECTION OF THIS BID INVITATION WILL TAKE PRECEDENCE OVER THESE GENERAL REQUIREMENTS AND CONDITIONS.**

Revised 10/18/12

**SAN BENITO CONSOLIDATED INDEPENDENT SCHOOL DISTRICT**

**REQUEST FOR QUALIFICATIONS  
RFQ-0313-IAVP  
INSURANCE AGENT-VOLUNTARY PLANS**

**I. SCOPE AND INTENT**

San Benito CISD is seeking qualifications of licensed insurance agent, to serve as the agent for employees of the San Benito CISD seeking to purchase voluntary insurance products as a part of the districts IRS Section 125 Cafeteria Plan. The agent will not be responsible for the selection of products as those have already been selected by the district through a separate bidding process.

**II. FACTS AND STATISTICS-This is for your information only.**

- A. At present, SBCISD operates twelve (12) elementary schools, three (3) middle schools, one ninth grade academy and one high school. This district employs approximately 1800 employees. New employees will be effective September 1<sup>st</sup>.
- B. Disability (Short/Long) Information:
  - 1. Total Participants: 1004
  - 2. Monthly Premium: \$44,107.90 as of May 31, 2012
  - 3. Design Plan Description: Begins after 7 days up to 12 weeks, continues to 90 days up to age 65. Premium determined by annual salary.
- C. The current plans offered are the following. All proposing insurance agents must be authorized and capable of providing these plans.

ASSURANT ACCIDENT  
COLONIAL CANCER  
ALLSTATE STROKE AND HEART  
ALLSTATE GROUP CRITICAL ILLNESS  
ALLSTATE HOSPITAL SHOP  
UNUM LIFE INSURANCE  
ING LIFE INSURANCE  
ASSURANT DISABILITY  
FLEXIBLE DEPENDENT SPENDING  
FLEXIBLE MEDICAL SPENDING  
DAVIS VISION

**III. QUALIFICATIONS & REQUIREMENTS QUESTION & ANSWERS SECTION**

**The proposer must possess the following criteria and provide answers or statements for questions or requirements listed below.**

**A. QUALIFICATIONS**

- 1. Name of Firm/Individual.
- 2. Brief company history.
- 3. Have the appropriate credentials including the State of Texas Department of Insurance license(s), Group I Life and Health.

4. Have active insurance for agent's errors and omissions liability with a limit of at least \$1 million per occurrence.
5. Have a minimum of five years of experience in the industry and at least five years of experience in agent services. (i.e.: Fully and Self-Funded Group Health Insurance plans, Stop-Loss, Life and AD&D and/or Voluntary Benefit Plans, etc.)
6. References of the primary agent and agency.
7. List demonstrated support of educational initiatives of the agent/agency.
8. List name of primary agent and agency, office location, staff assigned.
9. Provide names, credentials and professional affiliations of persons assigned to this account. Including bios of any and all office staff assigned to the account (licenses, experience and tasks assigned, etc.).
10. Provide current (3) and prior references (2) of the primary agent/agency; use the attached form provided.
11. Presentation to district committees if requested.

## **B. SERVICE REQUIREMENTS**

1. Provide on-going services to assure overall plan satisfaction.
2. Assist District in troubleshooting claims, eligibility and contract issues
3. Review, confirm and advise regarding, Life and AD&D and Voluntary Plans.
4. Assist with the implementation and evaluation of the Plan for the 2013-2014 school years.
5. Provide **on-site** support to employees and administration during peak enrollment periods
6. Assist District with Post Open Enrollment issues
7. Provide on-going analysis and reports of the program as requested and on-line capabilities.
8. Meet and present to/with the Employee Benefits Committee, Administration, Board Insurance Committee, Ad-Hoc Advisory Committee and the Board of Trustees as requested.
9. Assist with administrative aspects of implementation of selected plans.
10. Develop communications that will help employees understand and utilize benefits and programs
11. Agree to pay for the current TPA administrator David K. Young or provide your own.

## **IV. SELECTION CRITERIA**

### **A.General**

The proposals will be evaluated by specific criteria. The San Benito CISD shall use the following selection criteria to select the service provider that offer the best value to San Benito CISD. The scores assigned to each selection criteria are indicated in the selection criteria and scores chart attached herein.

Each criterion is assigned a score of 1 to up to the maximum points as indicated in the assigned points column. The scores of each criterion will then be added for each proposal; and the proposal receiving the highest score will be considered the proposal, which offers the best qualifications value, and is beneficial and internally maintainable for the San Benito CISD.

## **B. Procedures/Steps**

It is the intent of San Benito CISD to follow these procedures/steps to award contract:

- A. All proposals received will be open and read aloud.
- B. Evaluation Committee will evaluate proposal, summarize, and rank the proposals as to the best qualifications value to the San Benito CISD.
- C. Superintendent or his designee approves the ranking of the proposal and directs next step.
- D. If necessary, at the Superintendent's discretion, negotiation/discussion of changes in the nature of proposals and in prices begin.
- E. After negotiations/discussions are complete, the Superintendent prepares the recommendation to the Board of Trustees for contract approval.
- F. Board of Trustees act on Superintendent's recommendation.
- G. Contract is awarded and the selected vendor provides an attached completed contract.

C. In awarding contract, the District shall consider the selection criteria as follows:

<u>Criteria</u>	<u>Assigned Points</u>
<b>1. Service Reference</b>	<b>35</b>
<b>2. Experience in Industry</b>	<b>20</b>
<b>3. Staffing availability and Locations</b>	<b>25</b>
<b>4. Experience with School Districts</b>	<b>10</b>
<b>5. On-line Enrollment Capabilities</b>	<b>10</b>

- D. The required proposal response format should consist of a cover letter, general information such as address, phone, etc. of the proposer, and then followed by the information required in Section II above.
- E. **Three (3) copies of qualifications should be submitted.**

## **V. IMPORTANT NOTES**

- A. Agents shall not communicate or coordinate with other departments/campuses, Board Members, or stakeholders without prior coordination and authorization of the Purchasing Agent.
- B. San Benito CISD will not be liable for any fees involved with these services requested.
- C. Because this is in the mid-term of the enrollment process the insurance agent awarded this contract will be responsible to continue the enrollment process of voluntary plans that employees request or require.
- D. This is not a solicitation for the procurement of insurance products.
- E. Contract term will commence after the Board of Trustees award the contract.

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**ANTI-COLLUSION CERTIFICATION SUBMISSION FORM**

**Important Note: The prospective vendor's failure to include the completed and executed ANTI-COLLUSION CERTIFICATION SUBMISSION FORM disqualifies the proposal.**

The undersigned certifies that:

- a) This Proposal was exclusively developed and prepared without collusion with any competing proposer.
- b) The content of this Proposal has not and will not knowingly be disclosed to any competing or potential competing proposer prior to the opening date, time and place specified.
- c) No act to persuade any person, partnership or corporation to submit or withhold a Proposal has been made.
- d) The undersigned warrants having a complete understanding regarding the accuracy of the statements in this certificate and the penalties applicable to the Prospective vendor and signatory representing the Prospective Vendor.
- e) Affiant, further states their officers, employees or agents have not, and will not attempt to lobby, directly or indirectly, the Board of Trustees of the San Benito Consolidated Independent School District between proposal submission date and award by the Board of Trustees of the San Benito Consolidated Independent School District.

Company Name: \_\_\_\_\_

Address of Company: \_\_\_\_\_

Name of Agent: \_\_\_\_\_

Authorized Signature: \_\_\_\_\_

Signatory Name and Title (Printed): \_\_\_\_\_

Telephone: \_\_\_\_\_

Date: \_\_\_\_\_

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**VENDOR/CLIENT REFERENCES**

Please list a minimum of 3 references of current clients for which a similar service is provided. Other cities or institutions with similar benefits are preferred. Include address, name of contact person and telephone number.

**Current References**

1. ENTITY \_\_\_\_\_  
CONTACT \_\_\_\_\_  
TELEPHONE \_\_\_\_\_  
ADDRESS \_\_\_\_\_

2. ENTITY \_\_\_\_\_  
CONTACT \_\_\_\_\_  
TELEPHONE \_\_\_\_\_  
ADDRESS \_\_\_\_\_

3. ENTITY \_\_\_\_\_  
CONTACT \_\_\_\_\_  
TELEPHONE \_\_\_\_\_  
ADDRESS \_\_\_\_\_

**Prior References**

1. ENTITY \_\_\_\_\_  
CONTACT \_\_\_\_\_  
TELEPHONE \_\_\_\_\_  
ADDRESS \_\_\_\_\_

2. ENTITY \_\_\_\_\_  
CONTACT \_\_\_\_\_  
TELEPHONE \_\_\_\_\_  
ADDRESS \_\_\_\_\_