

REQUEST FOR QUALIFICATIONS

Sealed bids addressed to Amanda Morales, City Secretary/HR Director, City of La Feria, 115 E. Commercial Ave. La Feria, Texas, will be received on Tuesday, September 7, 2021, until 10:00 a.m., at which time they will be taken to the City Hall Commission Meeting Room and will be read aloud.

**SEALED BIDS FOR
RFQ - AGENT OF RECORD
FOR HEALTH, LIFE, AD&D AND SUPPLEMENTAL INSURANCES
CITY OF LA FERIA
115 E. COMMERCIAL AVE.
LA FERIA, TEXAS 78559**

Specification can be obtained by calling the City Secretary at 956-797-2261, by picking them up at the La Feria City Hall, 115 E. Commercial Ave., La Feria, Texas between the hours of 8:30 a.m. – 4:30 p.m., Monday thru Friday, or by downloading them from the City's web- site, www.cityoflaferia.com.

Be advised that if a firm downloads the bidding document from the web page and is contemplating bidding on the project, the respondent must register with Amana Morales, City Secretary/ HR Director so that any changes/additions via Addendum can be forwarded to the firm. Register by email at amorales@cityoflaferia.com. In the subject line of your email, please include RFQ Agent of Record. Within the email, please include the firm's name, contact person's name and tile, email address, mailing address and phone.

The City of La Feria reserves the right to refuse and reject any or all bids and to waive any or all formalities or technicalities or to accept the bid to be the best and most advantageous to the City, and hold the bids for a period of sixty (60) days without taking action. Bids submitted past the aforementioned date and time will not be accepted.

Caution to those submitting bids; those not in proper form may be rejected.

I. GENERAL INFORMATION:

City of San Juan (City) is seeking written proposals from qualified insurance agents to serve as the Agent of Record for insurance services including health, life, AD&D and supplemental insurances. This is to include providing the City of La Feria 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 La Feria employees related to our group benefits.

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 year at the City's discretion.

The City of La Feria must receive one (1) hard copy of your submission and one electronic pdf copy on a flash drive by **10:00 a.m. on Tuesday, September 7, 2021**. Proposals must be in a sealed envelope, clearly marked **RFQ INSURANCE AGENT OF RECORD PROPOSAL** and should be delivered and received by mail or in person to the following address:

**City of La Feria
Attention: Amanda Morales, City Secretary/HR Director
115 E. Commercial Ave.
La Feria, Texas 78559**

Proposals should be prepared simply and economically, 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.

Proposals shall be firm for a period of sixty (60) days after the closing date. Each responding proposer may withdraw their proposal if it has not been accepted within sixty (60) 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 clarifications of this RFQ must be requested in writing. All questions should be directed to Amanda Morales, City Secretary/ HR Director. All questions are due by 4:00PM on Thursday, September 2, 2021. Send questions to amorales@cityoflaferia.com.

II. SCHEDULE OF EVENTS/DATES:

ACTION	DATE
Issue RFQ	Wednesday, August 25, 2021
Final Questions Due	Thursday, September 2, 2021
Proposals Due	Tuesday, September 7, 2021
Proposal Review	TBD
Notice of Intent to Award	TBD

III. PROPOSAL SUBMISSION REQUIREMENTS:

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

1. Cover letter addressed to Amanda Morales, City Secretary/ HR Director and signed by a person legally authorized to bind the applicant to its proposal. The cover letter must include name of the 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) / agents 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 La Feria;
 - 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 20 miles of City of La Feria.
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 La Feria 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, contacts with members of the City Staff, which are outside of the establish 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 San Juan 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 San Juan no later than the 7th 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

<https://www.ethics.state.tx.us/data/forms/conflict/CIQ.pdf>. If you have any question about compliance, please consult 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 addition year 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 Amanda Morales, City Secretary/HR Director. Re-submittal before the RFP 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 La Feria Contacts: The designated individual responsible for coordination of the RFQ is Amanda Morales, City Secretary/HR Director. Any questions relating to this RFQ should be directed to amorales@cityoflaferia.com in writing only.