

**EDUCATION SERVICE CENTER REGION 19  
RFQ AWARD SUMMARY**

**RFQ TITLE:** Supplemental Insurance Products and Related – ESC Region 19 Allied States Cooperative  
**RFP NUMBER:** 14-7022  
**RFQ OPENING DATE:** February 22, 2014  
**CONTRACT TERM:** Date of award until March 31, 2015 with four (4) one-year optional renewal periods not to exceed 60 months in the aggregate  
(Extended by Region 19 until March 31, 2016)  
(Extended by Region 19 until March 31, 2017)  
(Extended by Region 19 until March 31, 2018)  
(Extended by Region 19 until March 31, 2019)  
**FUNDING SOURCE:** Various  
**RFQ's ISSUED:** 26  
**RESPONSES:** 1  
**ADVERTISEMENT DATES:** Washington Post on February 7, 2014 & February 14, 2014  
**BOARD MEETING DATE:** March 20, 2014

**RECOMMENDED FOR AWARD** **Financial Benefit Services (FBS)**

**TOTAL (estimated)** \$1,000,000.00 / year

**EXPLANATIONS:**

Award of this contract will enable ESC Region 19 Allied States Cooperative members and ESC Region 19 to utilize the supplemental insurance products and related services when required during the contract period. Reference checks were performed on proposal submission. Financial Benefit Services (FBS) was the sole bidder.

**SPECIFICATIONS PROVIDED BY:** Royce Cleveland  
ESC Region 19 Allied States Cooperative

**EVALUATION COMMITTEE:** Royce Cleveland  
ESC Region 19 Allied States Cooperative  
  
Linda Cooper  
ESC Region 19 Allied States Cooperative Human Resources  
  
Linda Epstein  
ESC Region 19 Allied States Cooperative Human Resources  
  
Martin Camacho  
ESC Region 19 Allied States Cooperative  
  
Mary Jane Lopez  
ESC Region 19 Allied States Cooperative

**ORDER INFORMATION:**

**Financial Benefit Services (FBS)**

Attn: Coby James  
2121 N. Glenville Drive  
Richardson, TX 75082  
800-583-6908  
Fax: 469-385-4641  
[www.fbsbenefits.com/](http://www.fbsbenefits.com/) / [cobyj@fbsbenefits.com](mailto:cobyj@fbsbenefits.com)

States Covered – Texas

**Key Personnel**

Coby James - Lead Consultant [cobyj@fbsbenefits.com](mailto:cobyj@fbsbenefits.com)

Debbie Walker - Account Executive [debbiew@fbsbenefits.com](mailto:debbiew@fbsbenefits.com)

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Stephanie Nichols – New Business & Enrollment Services [stephanie@fbsbenefits.com](mailto:stephanie@fbsbenefits.com)

Alicia Boothe – Billing Services Manager [aliciab@fbsbenefits.com](mailto:aliciab@fbsbenefits.com)

FBS offers consulting, Third Party Administration, Billing and Online Enrollment / Benefit Administration System. FBS holds Texas Department of Insurance “Insurance Counselors License” which enables FBS to act in a consulting capacity. FBS online enrollment system is managed and housed in Richardson, Texas and FBS has the capability of exporting enrollment data to insurance carriers and import data into payroll systems. In addition, FBS common remitter system allows us to truly reconcile carrier billings thus allowing for us to provide a clean billing report. FBS is a full service brokerage firm and represents many different A rated insurance carriers.

Approved by: \_\_\_\_\_  
(Armando Aguirre- Executive Director)  
(Armando Aguirre- Executive Director)  
(Armando Aguirre- Executive Director)  
(Armando Aguirre- Executive Director)

Date: \_\_\_\_\_  
(March 6, 2014)  
(February 25, 2015)  
(March 18, 2016)  
(January 11, 2018)