

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

RFQ TITLE: Supplemental Insurance Products, Brokerage, Consulting Services and Related – ESC Region 19 Allied States Cooperative

RFQ NUMBER: 17-7256

RFQ OPENING DATE: July 11, 2017

CONTRACT TERM: Date of award until August 31, 2019 with the option to extend another two (2) two (2) years, not to exceed 72 months in the aggregate.
(Extended by Region 19 until August 31, 2021)
(Extended by Region 19 until August 31, 2023)

FUNDING SOURCE: Various

RFQ's ISSUED: 59

RESPONSES: 6

ADVERTISEMENT DATES: Washington Post – June 5, 2017 & June 12, 2017
El Paso Times – June 5, 2017 & June 12, 2017

BOARD MEETING DATE: October 19, 2017

RECOMMENDED FOR AWARD **Competitive Benefits Analysis**
FBMC Benefits Management, Inc.
HUB International Insurance Services
Mass Mutual-South Texas
U.S. Employee Benefits Services Group

TOTAL (estimated) **\$100,000,000.00 /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. Evaluation and award recommendation will be based on 30% references, 30% product diversity & portfolio, 20% legal compliance procedures, 10% vendor history, 10% marketing plan. All companies that submitted proposals came back with evaluations totals over 90%. Augeo Affinity Insurance Services, Inc. took an exception to ASC's Indemnification clause, which was not found to be in the best interest of ASC or ASC members, and for that reason they were not considered.

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

EVALUATION COMMITTEE: Royce Cleveland
ESC Region 19 Allied States Cooperative

Rebecca Hernandez
ESC Region 19 Allied States Cooperative

Rena Lawrence
ESC Region 19 Allied States Cooperative

ORDER INFORMATION:

Competitive Benefits Administrators

Attn: Samuel J. Garcia or Nila Moore
6121 Indian School Rd., N.E., Suite 240
Albuquerque, NM 87122
505-883-2527
Fx: 505-883-1668
sjgarcia@cba-inc.us / nila@cba-inc.us

Services Provided- Core & Supplemental Insurance Products to Include: Medical, Dental, Vision, Life, Disability, Cancer, Critical Illness, Specified Illness, Accident, Section 125 Administration along with complete Brokerage and Benefit Consulting Services, and offers Value Added Services: "Whole Health Engagement", "The Retirement Academy", "Retirement Calculator", "Paid Up Retirement Life Insurance", A unique Auto and Home program, Legal Expense Coverage, Hearing Savings Plan, and a "Purchasing Plan".

States Covered- NM, TX

FBMC Benefits Management, Inc.

Attn: ~~Jack McDermott or Gilberto "Gil" Gonzalez~~ *updated 9/20/18
~~Kiera Hanselman~~ Whitney Hill or Gwendolyn Taylor *updated 6/18/19
3101 Sessions Road
Tallahassee, FL 32303
~~850-425-6200 ext. 2205~~ 325-280-3359 or 713-303-2837
Fx: 850-425-6220
khanselman@fbmc.com whill@fbmc.com or gtaylor@fbmc.com
pflemming@fbmc.com / ggonzalez@fbmc.com / www.fbmc.com

Services Provided- Employee Benefits Management and Consulting, Consulting and Brokerage, Communications and Education, Enrollment Management and Call Center Support, Administration and Compliance Services, and Brokerage, Consulting, and Administration Services related to Major Medical Health Plans.

States Covered- All 50 States

HUB International Insurance Service

Attn: Randy McGraw
201 E. Main, Suite 800
El Paso, TX 79901
915-206-6052
Fx: 866-399-3972
Randy.McGraw@hubinternational.com / www.hubinternational.com

Services Provided- *HUB INTERNATIONAL WILL SERVE AS A SUB-CONTRACTOR TO U.S. EMPLOYEE BENEFIT SERVICES GROUP.* - Employee Benefit Consulting Services

States Covered- NM, TX

Mass Mutual- South Texas

Attn: Edward Hernandez
10101 Reunion Place, Ste. #300
San Antonio, TX 78216
210-384-5378
Fx: 210-342-6460
edwardhernandez@financialguide.com / www.southtexasmassmutual.com

Services Provided- Financial Strategies using Life Insurance, Annuities, Disability Income Insurance, Long Term Care Insurance, Retirement Planning, Estate Planning, Fee-Based Planning and College Funding Products, as well as Income Management and Investment Services, and more.

States Covered- TX

ORDER INFORMATION:

U.S. Employee Benefit Services Group

Attn: Keith Noel

1006 Ridge Road, Suite A

Rockwall, TX 75087

972-772-0900

Fx: 972-722-0901

kenoel@usebsg.com / www.usebsg.com

Services Provided- Benefits Design, Online Enrollment & Administration, Section 125 & Flexible Spending Accounts, COBRA Administration, FMLA, HSA, Common Remitter Service, 403(b) & 457(b) Third Party Administration, 457 (b) Deferred Compensation Plans, FICA Alternative & Special Pay Plans, Financial Literacy, STEP Program, Affordable Care Act Compliance Assistance.

States Covered- NM, TX

SPECIAL CONDITIONS- READ CAREFULLY

1. Vendor must be LHIC (Life & Health Insurance Counselors) Licensed and as Third Party Administrator or contract with a licensed Third Party Administrator and maintain a good relationship with school districts in Texas and other States it proposes to sell and service this contract.
2. Vendor must provide at least five references with an employment of 1,000 employees or larger that company has been doing business with for at least 2 or more years.
3. Vendor must have Online Enrollment System with capability of Exporting Enrollment Data to selected insurance carriers.
4. Vendor must act as the Consultant for the Region 19 ASC member in determining plan design, types of supplemental insurance products, and other critical components which best serve Cities, Counties, Universities, Community Colleges, School Districts, Political Subdivisions, and other eligible entities that could participate in this State Agency Cooperative either through a multi- state or national basis.
5. Vendor will be responsible for regularly information all participating members on any Affordable Health Care Regulations that could impact employer or employees.
6. Bid supplemental insurance products through an RFP process and provide analysis through a comprehensive spreadsheet format.
7. Conduct meetings and enrollments with all personnel on mutually agreed upon days to educate and inform, answer questions, and give presentations on all supplemental plans and related products.
8. Vendor must provide quarterly review of supplemental insurance products, performance, and status to assess the integrity of the benefits offered to employees.
9. Vendor must be able to provide a custom benefit website with full access to carrier information, product brochures, claim forms, and full access for employees to login and view benefit information and flex spending accounts.
10. Vendor must have the capability of enrolling TRS Medical as well as other State Retirement Systems via the online enrollment system and export data to insurance carriers. The proposer will provide five clients (School Districts, local Governments) in which electronic data enrollment is remitted electronically.
11. Vendor must be able to provide a toll-free telephone line for customer service and billing, as well as bi-lingual service representative(s) available during normal working hours. Vendor must also provide a dedicated Call Center during open enrollments.
12. Vendor must provide Consolidated One-Check billing and full reconciliation of carrier billings to ensure accurate monthly billings.
13. Vendor must also be able to provide district with payroll deduction file for Skyward Financial software.
14. Vendor must have an assigned Account Executive for each member utilizing this contract (in Texas and other States) that reports directly to the Region 19 ASC member's designated personnel.
15. Vendor must maintain compliance with Internal Revenue Code (IRC) and Department of Labor regulations and rules of the employer for Section 125 and 403(b), including but not limited to, Plan Documents, Plan Changes and Amendments, Form 5500 and other required Internal Revenue Service (IRS) Filings.
16. Vendor must act as the District or ASC Member liaison for plan operations to assist with the resolution of

employee, participant and administrative problems as they may come up during the contract period.

REQUIRED QUESTIONNAIRE

1. Total number of employees?

Competitive Benefits Analysis-	10 Employees, 4 Contracted Staff. Approximately 200 independent contracted field sales staff.
FBMC Benefits Management, Inc. -	125 Full Time Employees
HUB International Insurance Services-	Over 10,000 in North America, El Paso Office has Office has approximately 70 employees. El Paso Consulting Team has 4 Team Members. Access to additional Texas and New Mexico based consultants as needed.
Mass Mutual-South Texas-	60 Employees
U.S. Employee Benefits Services Group-	10 Employees

2. Number of years in business?

Competitive Benefits Analysis-	42 Years
FBMC Benefits Management, Inc. -	41 Years
HUB International Insurance Services-	16 Years, Consulting Tenure for 11 Years
Mass Mutual-South Texas-	65 Years
U.S. Employee Benefits Services Group-	35 Years

3. Does vendor charge additional fees for work performed outside normal business hours? If yes, please explain.

Competitive Benefits Analysis-	No Additional Charge Outside of Normal Business Hours
FBMC Benefits Management, Inc. -	No Additional Charges Outside of Normal Business Hours, Within Scope of Contracted Services
HUB International Insurance Services-	No Additional Charge Outside of Normal Business Hours
Mass Mutual-South Texas-	No Additional Charge Outside of Normal Business Hours
U.S. Employee Benefits Services Group-	No Additional Charge Outside of Normal Business Hours

4. Provide a designated contact person for expedited/emergency work.

Competitive Benefits Analysis-	Joe Lopez. COO
FBMC Benefits Management, Inc. -	Gil Gonzalez
HUB International Insurance Services-	Randy McGraw- 915-206-6052, randy.mcgraw@hubinternational.com
Mass Mutual-South Texas-	Edward Hernandez, Michael Jimenez
U.S. Employee Benefits Services Group-	Lori Rowe, Director of Client Services

5. This bid will be for use by ESC Region 19 and its ESC Purchasing Cooperative members as well as any other members that join during the contract period. Will the vendor agree to service other members throughout the period of the contract performance? If not, please explain:

Competitive Benefits Analysis-	Agreed
FBMC Benefits Management, Inc. -	Agreed
HUB International Insurance Services-	Agreed
Mass Mutual-South Texas-	Agreed
U.S. Employee Benefits Services Group-	Agreed

6. Provide four (4) educational or related references company has provided services to during the past 12 months? Information must have Agency Name, Contact person, person's title, phone number, mailing address, and email address if available.

On File

7. Average response time for consultation? Provide details.

Competitive Benefits Analysis-

Average 24 Hours, but no later than the next business day

FBMC Benefits Management, Inc. -

Immediate Response Time

HUB International Insurance Services-

ASAP, Never more than a 24 hour delay. Consulting advise contingent on complexity of task.

Mass Mutual-South Texas-

24-48 hours

U.S. Employee Benefits Services Group-

Dependent on type of consultation, turnaround time is 24-48 hours

Approved by: _____
(Armando Aguirre- Executive Director)
(Armando Aguirre -Executive Director)
(Armando Aguirre -Executive Director)

Date: _____
(September 11, 2017)
(July 8, 2019)
(May 26, 2021)