

**EDUCATION SERVICE CENTER REGION 19 ALLIED STATES COOPERATIVE**  
**RFQ AWARD SUMMARY**

**RFQ TITLE:** Insurance Brokerage Services – ESC Region 19 Allied States Cooperative  
**RFQ NUMBER:** 23-7468  
**RFQ OPENING DATE:** July 18, 2023  
**CONTRACT TERM:** Date of award until June 30, 2025, with no annual extension options.  
**FUNDING SOURCE:** Various  
**RFQ's ISSUED:** 1,384  
**RESPONSES:** 1  
**ADVERTISEMENT DATES:** El Paso Times – June 19, 2023 & June 26, 2023  
**RECOMMENDED FOR AWARD:** **FBMC Benefits Management Inc**  
**TOTAL (estimated)** **\$1,000,000.00/year**

**EXPLANATIONS:**

Award of this solicitation will enable ESC Region 19 - Allied States Cooperative (ASC) to establish a contract with vendor(s) for Insurance Brokerage Services for those procurements made with federal, state or local funds. Evaluation and award recommendation were based on 30 points for reputation/references, 30 points for quality of goods/services, and 40 points for meets the needs. The awarded vendors' pricing and information can be found on the Award Detail spreadsheet.

**SPECIFICATIONS, PREPARATION AND EVALUATION PROVIDED BY:**

Rebecca Hernandez – ESC Region 19  
Andrea Amiri – ESC Region 19  
Patty Delgado - ESC Region 19

**Special Conditions**

1. This solicitation is not for a specific quantity or specific location. By earning a contract, vendors will be able to provide future services to any ASC members.
2. This solicitation is a supplemental solicitation to #19-7337. Vendors awarded on 19-7337 do not need to respond to this solicitation as they are already awarded.
3. This RFQ is for brokerage services only. This RFQ may not be used to procure insurance directly as such items must be competitively procured.
4. Vendor is responsible for helping members search for insurance products that may include health, major medical, life, cancer, dental, vision, disability, general liability, workers compensation, vehicle and crime.
5. Vendor will be responsible to bid insurance products through an RFP process and provide analysis through a comprehensive spreadsheet format.

6. Vendor must have either: 1. Property & Casualty Broker License and/or 2. Employee Benefits Broker License.
7. Vendor must have online enrollment system with the capability of exporting enrollment data to selected insurance carriers. The system should be administrator friendly and feature new hire additions, terminations, and changes. All history for employees and dependents should be kept including elected, changed, or declined coverage.
8. Vendor must act as the Consultant for the member in determining plan design, types of supplemental insurance products, and other critical components.
9. Vendor will be responsible for regularly informing all participating members on any legal regulations that could impact employer or employees.
10. 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.
11. Vendor must have a secure base for import/export of bills, payables, billing, enrollment, reports, etc. with history.
12. System should be able to generate reports that are customizable and can be saved. System must also check for fields that have exceptions (incomplete data, duplications, age limits, etc. EOI pending/approval)
13. Vendor will 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.
14. Vendor must provide quarterly review of supplemental insurance products, performance, and status to assess the integrity of the benefits offered to employees.
15. 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. Vendor will export to BSwift at least twice per week.
16. Vendor must be able to provide a toll-free telephone line for customer service and billing, as well as bilingual service representative(s) available during normal working hours. Vendor must also provide a dedicated Call Center during open enrollments.
17. Vendor must provide Consolidated One-Check billing and full reconciliation of carrier billings to ensure accurate monthly billings.
18. Vendor should accept payroll deductions at the end of the month (paying in arrears). Billing information will be provided within 10 days of payroll. Discrepancy report will be provided by vendor to member for reconciliation.
19. Vendor must be able to provide district with payroll deduction file for member's external software.
20. Vendor must have an assigned Account Executive for each member utilizing this contract that reports directly to the member's designated personnel.
21. 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, 1095C forms, and other required Internal Revenue Service (IRS) Filings.
22. Vendor must act as the 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. This includes

providing support and customer service to assist with the resolution of any issues the members may have with their carriers.

23. The 2% administrative fee will be paid based on the brokerage fee or broker's commission for ESC Region 19 and ASC members.

Approved By: \_\_\_\_\_  
Dr. Armando Aguirre

Date: \_\_\_\_\_  
July 24, 2023