



REQUEST FOR PROPOSAL

**RFP #24-02 Benefit Consulting Services
Posted February 2, 2024**

Benefits Consultant

The City of Hudson Oaks, Texas (City) is seeking a benefits consulting firm to perform the full range of services related to the design, implementation, maintenance and enhancement of the City of Hudson Oaks' employee benefits program.

Background

The City of Hudson Oaks is located in Parker County, Texas, and has a total of 26 full-time, benefit eligible employees. Current benefits available are medical, prescription, dental, life, vision, health reimbursement account (HRA), flex spending accounts (FSA) and dependent care accounts (DCA), employee assistance program (EAP) and wellness options.

The City is self-funded through Texas Health Benefits (formerly TML Health Benefits); a PPO is offered to active employees through Blue Cross Blue Shield Healthcare. The dental, vision, life and prescription plans are also available through Texas Health Benefits. The City's HRA, FSA and DCA are administered through National Benefits Services.

Scope of Services

- Develop short and long range innovative employee benefit goals and strategies.
- Partner with the Human Resources Coordinator in the administration of all group insurance plans including responding to questions from and providing information to staff, and providing other benefits-related advisory services throughout the plan year.
- Review and analyze claims experience, claim service, and claim administration to ensure maximum benefit.
- Determine and recommend the most cost efficient funding methods for benefit programs.
- Assist with preparing bid specifications and solicit proposals, as needed, from insurance markets that specialize in group insurance plans.
- Assist with bid evaluation and bidders, including administration, coverage, claim payment procedures, customer service, networks, reserve establishment policies and financial solvency.
- Provide in-depth analysis of proposed alternatives and assist with the process of selecting the most favorable annual renewal options.
- Inform the City of local and national benefit trends and provide benchmark survey data to help calibrate program offerings with employee and employer costs compared to similar organizations.
- Meet with and provide reports and presentations to various City of Hudson Oaks representatives quarterly, including City Council if requested.
- Assist with the implementation and communication of new programs or changes to existing programs, which may include attending and presenting information at Open Enrollment meetings when requested.
- Work closely with the Human Resources team to develop and execute the benefits communication strategy.
- Partner to effectively manage the performance of vendors that provide insurance or related services.



- Act as advisor on issues such as discrimination testing, COBRA, HIPAA, Medicare, FMLA, etc. Provide overall guidance concerning health and welfare regulatory compliance including ACA requirements.
- Research and report any new developments in the employee benefits arena on an ongoing basis.
- Recommend innovative ideas and new products, programs and services to ensure competitive, valued and cost effective benefits program.
- Introduce proven programs and ideas to aggressively manage healthcare costs.
- Assist with the analysis of return on investments and development of wellness programs, to include recommendations and incentives to enhance current or new programs.
- Educate and advise on Healthcare Reform, specifically PPACA, and the key strategic decisions that should be considered.
- Assist with filing of all IRS tax forms.
- Prepare and/or assist in procuring an actuarial valuation following GASB 45 standards to include the necessary material for the Comprehensive Annual Financial Report to comply with GASB OPEB reporting and disclosure requirements.

Evaluation Criteria

1. Prior experience with governmental entities as clients.
2. Prior experience with organizations with less than 50 employees as clients.
3. Prior experience with self-funded health and dental plans.
4. Understanding of and direct experience with the North Texas demographic area healthcare delivery concerns.
5. Prior experience with private exchange system.
6. Prior experience in developing innovative programs.
7. Describe the on-going support you would give the City regarding plan performance.
8. List additional services which your firm offers which may not be listed in the evaluation criteria.
9. The cost to be charged by the proposer to perform the services required under this solicitation.

The evaluation of the proposals will be made based on the criteria listed below. While pricing is a consideration, it is clearly not the primary factor in the selection of the firm. The contract award will not necessarily be made to the firm that provides the lowest cost proposal. The contract award will be based primarily on demonstrated competence and qualifications using the listed criteria. It is important that the proposal be clear and complete. Incomplete applications will not be considered under any circumstances.

25 points	Qualifications and experience of the firm and key personnel to be assigned to work with the City particularly as it relates to performing similar engagements for governmental entities
25 points	Technical ability of the firm to perform the needed services, including an evaluation of the engagement plan and proposed staffing as well as, if applicable, a performance evaluation based on any prior work experience with the firm
10 points	Thoroughness of the response as it relates to the Scope of Work requirements and organization of the requested information
15 points	References substantiating the firm's experience and success in providing services to similar governmental entities



25 points Proposed fee for Service

Application Review

The proposals will be reviewed and evaluated by City staff which may include the City Secretary (Human Resources Coordinator), Assistant City Administrator, Finance Analyst and City Administrator. Based on these reviews and evaluations, City staff will forward a recommendation to the City Council, which will make the final selection. As part of the evaluation process, the City may invite any one or all firms to make an oral presentation to City staff to answer questions about the firm and the proposal. This presentation would be handled prior to the final staff recommendation.

Proposal Format

Electronic responses are preferred via email shelley.major@hudsonoaks.com. Firms submitting via mail are requested to submit all responses in a sealed package and delivered to the City of Hudson Oaks, City Secretary's Office, RFP #24-02, 210 Hudson Oaks Drive, Hudson Oaks, TX 76087. To be considered all responses should be received by March 6, 11:00 AM Central Standard Time. If responding via mail, the responding firms are requested to submit one paper copy and one digital copy on USB/flash drive. The City reserves the right to waive any irregularities or reject any and all responses as solely determined by the City.

- The responses are to be submitted as one document in PDF format and to include tabs 1 - 9 (reference evaluation criteria above);
- Each section is to be written precise and direct - explain/narrate the requested items;
- The entire response should not exceed 12 pages in length, not to include a 1 page maximum cover letter (optional), and Conflict of Interest Disclosure – provided as attachment A, include in proposal if applicable;
- Proposals shall be accepted on a fee only basis. The City will not consider a commission based proposal.

Additional Information

Should your firm have any questions concerning this RFP, please contact Shelley Scazzero, City Secretary, at 682-229-2411, shelley.major@hudsonoaks.com.

- At any time should the top ranked firm be excused or contract terminated, the City reserves the right to open discussions with the next ranked firm. This will continue until a firm is found that meets the needs of the City.
- There is no expressed or implied obligation for the City to reimburse responding firms for any expenses incurred in preparing responses to this request.
- By submission of a proposal, each firm certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or excluded from this procurement process by any local, state, or federal agency or other governing body.
- The City of Hudson Oaks is subject to the Texas Public Information Act, Chapter 552, of the Texas Government Code. Information that the respondent believes is confidential as proprietary information should be clearly marked as such with a detailed justification for a claim on confidentiality.



- The City of Hudson Oaks encourages the use of certified minority and women business enterprises (MWBE). Respondents agree to use good faith efforts in its selection of sub-consultants, as applicable, for projects that are awarded from this request for qualifications.
- Lobbying or engaging in any conduct to influence City staff, City Administrator, or City Council Members will not be permitted or tolerated during this process and may result in disqualification of the firm from this solicitation and for a period of two years following.
- The City reserves the right to request additional information or clarification and to permit the correction of errors and omissions contained within.

ATTACHMENT A

CONFLICT OF INTEREST QUESTIONNAIRE For vendor doing business with local governmental entity

FORM CIQ

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of vendor who has a business relationship with local governmental entity.

2 Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

Yes No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

Yes No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6 Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

Signature of vendor doing business with the governmental entity

Date

CONFLICT OF INTEREST QUESTIONNAIRE

For vendor doing business with local governmental entity

A complete copy of Chapter 176 of the Local Government Code may be found at <http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm>. For easy reference, below are some of the sections cited on this form.

Local Government Code § 176.001(1-a): "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

- (A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;
- (B) a transaction conducted at a price and subject to terms available to the public; or
- (C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

Local Government Code § 176.003(a)(2)(A) and (B):

(a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

(2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that

(i) a contract between the local governmental entity and vendor has been executed;
or

(ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than \$100 in the 12-month period preceding the date the officer becomes aware that:

- (i) a contract between the local governmental entity and vendor has been executed; or
- (ii) the local governmental entity is considering entering into a contract with the vendor.

Local Government Code § 176.006(a) and (a-1)

(a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

(1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of that local governmental entity.

(a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

(1) the date that the vendor:

(A) begins discussions or negotiations to enter into a contract with the local governmental entity; or

(B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

(2) the date the vendor becomes aware:

(A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);

(B) that the vendor has given one or more gifts described by Subsection (a); or

(C) of a family relationship with a local government officer.