

CITY OF MEXICO BEACH

Request for Qualifications

HEALTH INSURANCE AGENT/AGENCY SERVICES

(with Option for including dental, vision and life insurance services)

RFQ No. 2017-2

201 Paradise Path, Mexico Beach FL 32456

850-648-5700

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Advertisement for Request for Qualifications

The City of Mexico Beach ("City") is issuing a Request for Qualifications (RFQ) for an insurance agent/agency for group health insurance services. Responses must be submitted at City Hall, 201 Paradise Path, Mexico Beach, FL 32456, until 4:00 p.m., July 27, 2017. The RFQ may be downloaded from the City website at www.mexicobeachgov.com or picked up at City Hall.

Time is of the essence and any response received after 4:00 p.m. on July 27, 2017, whether by mail or otherwise, will be returned unopened. Proposers are responsible for ensuring their response to the RFQ is received by the deadline.

An original and six (6) copies of the response must be submitted in a sealed and marked envelope/package addressed to City of Mexico Beach, City Hall, 201 Paradise Path, Mexico Beach, FL 32456, Attn: Adrian Welle, City Clerk, and marked "RFQ No. 2017-02—Health Insurance Agent/Agency Services". All requests for additional information must be submitted in writing to the City Clerk at a.welle@mexicobeachgov.com, and should specifically include reference to RFQ No. 2017-02 in the subject line.

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Health Insurance Agent/Agency Services

I. INTRODUCTION

The City of Mexico Beach ("City") is seeking an insurance agent/agency to provide insurance services, to include consultation and strategic planning for, and design, negotiation and administration of, group health insurance. The agent/agency must have the expertise and capacity to provide products and services to meet the City's needs. Such expertise and capacity must be fully evident within the response provided and further verifiable through references. The City is requesting qualifications to ensure that our employees are continually offered the best benefits and services available. Interested insurance agents/agencies are requested to submit their credentials, qualifications and other information to assist the City in selecting the best qualified insurance agent/agency to meet the City's needs.

The City would like to receive, as an option, information on the Proposers' qualifications to provide services for dental, vision and life insurance.

The City of Mexico Beach has approximately 35 full-time employees.

Those agents/agencies responding will be referred to in this RFQ as Proposers. By submitting a response, the Proposer certifies that he/she has fully read and understands the RFQ and has full knowledge of the scope, nature and quality of work to be performed. The City expects Proposers to provide examples of, and commit to, proactive and aggressive pursuit of favorable plan/policy terms, conditions and pricing of health insurance coverage.

The successful Proposer will be asked to commence service upon selection.

II. RESPONSE INSTRUCTIONS

1- Submission of Response

- a. The City must receive your response, sealed and marked, by 4:00 pm, July 27, 2017, for the response to be considered. Confirmation of timely receipt of the response may be made by emailing the City Clerk at a.welle@mexicobeachgov.com before submittal closing time.
 - b. The response must be clearly marked on the outside of the envelope/package with: RFQ No. 2017-02—Health Insurance Agent/Agency Services.
 - c. The response must be submitted at the following address:
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City of Mexico Beach
City Hall
PO Box 13425, Mexico Beach, FL 32410
Attn: Adrian Welle, City Clerk

- d. Proposers must submit an original and six (6) copies of the response.

2-Content of Response

Response must include:

- a. Name of agent/agency, address of the headquarters' office, location of the office that will provide services to the City, and names of the primary and alternate contact persons and their contact information.
- b. The background and ownership of the agent's organization or the agency, including years in business, description of the organizational form (e.g., partnership, professional association) and number of employees.
- c. A list of employees who would work with the City, including a resume of each, their experience and tenure with the Proposer's organization, and the role each would serve in a relationship with the City.
- d. A statement of the agent's/agency's qualifications, including a description of public entity client service experience in the last 5 years.
- e. An explanation of the evaluation process the Proposer would use to determine the City's group insurance needs and the time-frame for completing the evaluation for the City's new fiscal year beginning October 1, 2017.
- f. An explanation of the process the Proposer will use to elicit benefit and premium information from carriers for the City's new fiscal year beginning October 1, 2017, how that information will be delivered and explained to the City, and the timeline in which this information will be delivered.
- g. An explanation of the service model the Proposer would use on an ongoing basis to provide his or her range of services to the City, including assistance with billing, enrollment and claims, and ongoing education on Health Reform, HIPAA, and state and federal laws.
- h. A list of three (3) public entity client references with complete contact information.
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- i. A statement explaining the commission fee structure and administrative fees from carriers that would provide the remuneration for the requested services to the City. All possible sources of compensation should be addressed, including, but not limited to, direct or indirect compensation, current and future compensation, placement or administrative fees, contingent commissions, renewal commissions, services fee, and any other form of compensation.
- j. A detailed description of the communication and enrollment process, including who handles the enrollment, who is responsible for explaining the plan(s), what information will be used during the enrollment process, and how new hires or terminations are processed.
- k. A list of all health insurance carriers from which the Proposer is authorized to receive plan and premium quotes; a list of those insurance carriers' in-network providers (i.e., family physicians, specialists, hospitals, clinical labs, outpatient centers, etc.), and the providers' pharmacy and preventive health services.
- l. A copy of all Florida insurance licenses currently held.
- m. A statement of the amount of insurance maintained by the Proposer in the following lines: errors and omissions; general liability, automobile liability and workers' compensation.
- n. Any additional resources or services available which may benefit the City.

OPTION—Response may include:

- a. A statement that dental, vision and life insurance services can be provided by the Proposer.
- b. Any information about dental, vision or life insurance services that would differ from the response provided in items c-j above.
- b. A list of all dental, vision and life insurance carriers from which the Proposer is authorized to receive plan and premium quotes, and a list of those insurance carriers' in-network providers.

3- Inquiries

The City will receive written requests for clarification concerning the meaning or interpretations of the RFQ, up to five (5) work days prior to the submittal date. Proposers may contact the City Clerk by email at a.welle@mexicobeachgov.com. The email should contain "RFQ 2017-02" in the subject line. No other official or employee of the City is authorized to interpret any portion of this RFQ or give information as to the requirements of the RFQ in addition to what is contained in the written RFQ document.

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Pursuant to section 287.057(23), F.S., Proposers or persons acting on their behalf may not contact, between the release of the RFQ and the end of the 72-hour period following the City posting a notice of intended selection, excluding Saturdays, Sundays, and state holidays, any official or employee of the City concerning any aspect of this RFQ, except in writing to the City Clerk. Violation of this provision may be grounds for rejecting a response.

4-Withdrawals

Proposers may withdraw their submittals by notifying the City Clerk at a.welle@mexicobeachgov.com in writing at any time prior to the deadline for submittal. Once opened, proposals become a record of the City and will not be returned to the Proposer.

III. PROCESS

1. Addenda

The City may record its response to inquiries and any supplemental instructions in the form of written addenda. The City may provide written addenda up to seven (7) calendar days before the date fixed for receiving the proposals. Proposers must contact the City to ascertain whether any addenda have been issued. Failure to do so could result in an unresponsive submittal. Any oral explanation given before the RFQ opening will not be binding.

2-Public Entity Crimes

Section 287.133, F.S., mandates no award will be made to any person or affiliate identified on the Department of Management Services' "Convicted Vendor List". This list consists of persons and affiliates who are disqualified from public contracting and the purchasing process because they have been found guilty of a public entity crime. A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid, proposal or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor or consultant under a contract with any public entity; and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months following the date of being placed on the convicted vendor list.

By signing and submitting the Bid documents, the submitting agency attests that they have not been placed on the "Convicted Vendor List" or found guilty of a public entity crime.

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3-Costs

Neither the City nor its representatives shall be liable for any expenses incurred in connection with preparation of a response to this Request for Qualifications.

4-Public Records

Upon selection of an agent/agency, or thirty (30) days after opening, whichever occurs first, submitted responses become "public records" and are subject to disclosure consistent with Chapter 119, Florida Statutes. Document files may be examined during normal working hours by appointment. If a Proposer believes that any portion of their response is confidential and/or proprietary, the Proposer must invoke the exemptions to disclosure provided by law in their response to the RFQ. The Proposer must identify the data or other materials to be protected, and must state the reasons why such exclusion from public disclosure is necessary and the specific legal authority of the asserted exemption. All material that qualifies for exemption from Chapter 119 must be submitted in a separate envelope, clearly identified with name and the RFQ number marked on the envelope.

5-Rights and Privileges

Rights and privileges granted by the City shall not be assigned or transferred in any manner whatsoever without written approval of the City Council. At all times during the term of the contract, any selected agent shall act as an independent agent.

6- Code of Ethics

If any Proposer violates or is a party to a violation of the code of ethics of the City of Mexico Beach or the State of Florida with respect to this proposal, such Proposer may be disqualified from performing the work described in this proposal or from furnishing the goods or services for which the proposal is submitted and shall be further disqualified from submitting any future proposals for work, goods or services for the City of Mexico Beach.

7-Disclosure and Disclaimer

Any action taken by the City in response to proposals made pursuant to this RFQ or in making any award or failure or refusal to make any award pursuant to such proposals, or in any cancellation of award, or in any withdrawal or cancellation of this RFQ, either before or after issuance of an award, shall be without any liability or obligation on the part of the City or their advisors. In its sole discretion, the City may withdraw this RFQ either before or after receiving proposals, may accept or reject proposals, and may accept proposals which deviate from the RFQ. In its sole discretion, the City may determine the qualifications and acceptability of any party or parties submitting proposals in response to this RFQ.

8-Non-Collusion

By submission of a response, Proposer certifies that their response is made without prior understanding, agreement, or connection with any corporation, firm or person submitting a

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Proposal for the same materials, services, supplies, or equipment and is in all respects fair and without collusion or fraud.

IV. SELECTION METHOD

1-Acceptance

The City reserves the right to accept or reject any or all submittals, with or without cause, to waive technicalities, to negotiate or not negotiate with and/or interview or not interview any or all Proposers, or to accept the proposal which, in its sole judgment, best serves the interest of the City.

2-Evaluation

The submittals will be evaluated using the criteria established to determine which submittal best meets the needs of the City. However, nothing herein will prevent the City from assigning work to any agent/agency deemed responsive and responsible. The City may also determine that it will be desirable to conduct interviews with top ranking agent/agencies. However, the City reserves the right to qualify a Proposer with or without an interview process.

3-Selection

The City will announce the names of all Proposers' whose responses were received timely. This will be done beginning at 4:05 p.m., July 27, 2017. The City Council members will separately evaluate the responses and then direct staff to schedule a public meeting(s) for Proposer interviews or for discussion on the evaluation, or both.

Evaluation Criteria

Qualifications/Experience/Resources

1. Demonstrated qualifications
2. Experience in relevant areas
3. Quality of client references
4. Account staffing (as reflected in experience, professional qualifications and designations of assigned personnel); location(s) of office(s) directly servicing City account
5. Any issues or concerns regarding the Proposer's experience or ability to provide the services

Skills and Services

1. Strategy for acquiring health insurance and communicating with Council, including meeting needed time frames for acquisition in 2017
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2. Quality and range of carriers represented
3. Quality and range of plan to ensure consistent servicing of the account (service model)
4. Claims administration (including billing issues, enrollment issues and employee claim assistance)
5. Advisory services (including new insurance trends and technical issues).

Other

1. Quality of the response/ability to communicate in writing
 2. A demonstrated understanding of the operations and needs of the City of Mexico Beach
 3. Creativity and presentation of innovative ideas or approaches or additional services beneficial to the City
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