

WORKFORCESOLUTIONS

GREATER DALLAS

September 28, 2021

Interested Respondents
Request for Quotations (RFQ)
Healthcare Insurance for a Small Group

Schedule of Events

RFQ released at 1:00 p.m. CDT on September 28th
Questions due prior to 8:00 a.m. on September 30th
Bidders' Conference at 9:00 a.m. CDT on September 30th
Proposals due by Noon CDT on October 12th

Workforce Solutions Greater Dallas (WFSDallas) is a non-profit organization that administers and acts as fiscal agent for programs consolidated at the local level and is responsible and accountable for the management of all workforce development funds made available to the local workforce development area. WFSDallas administers contracts and activities with a budget of approximately \$175M annually. WFSDallas is a quasi-governmental and non-profit organization. Funded by federal grants and private money, WFSDallas is one of the largest nonprofits in Dallas. Government funding sources have included Texas Workforce Commission, and the U.S. Departments of Labor, Health and Human Services, Agriculture, and Education. The Walmart Foundation, National Philanthropic Trust, New Profit, and Jobs for the Future are among the private partners that have added philanthropic resources to the solution.

Please see WFSDallas' website (www.wfsdallas.com) to learn more about workforce programs, Board of Directors and other pertinent information.

Services Solicited

Services solicited in this Request for Quotations (RFQ) Healthcare Insurance for a Small Group. Descriptions are provided below in the "Services for Response by Potential Respondents" in this RFQ.

Administration of This Request for Information (RFQ)

The RFQ is issued at 1:00 p.m. CDT, Tuesday, September 28, 2021 and available to download from the Board's website: <http://www.wfsdallas.com/doing-business>. If you are unable to download the RFQ please contact procurement@wfsdallas.com or (214) 290-1000.

The package does not include census and current healthcare coverage. You must contact fiscal@wfsdallas.com for this information. In your email request for this information, please include your name, company, email and phone. This package contains the remaining information and forms to respond to in this Request for Quotations (RFQ). A response to this RFQ must include all items listed in "Response Checklist and Order of Submission of the Services for Response by Potential Respondents section" of this RFQ.

Proposals must be officially received by WFSDallas via procurement@wfsdallas.com no later than **Noon CDT on Tuesday October 12, 2021**. **Any proposals or amendments received after the October 12, 2021 deadline will not be considered, but will be deemed late and non-responsive to this RFQ procurement process. Late proposals or amendments will be returned without review.** Proposals deemed responsive will be considered and recommendations will be presented for action (recommended or not recommended) at the WFSDallas Board of Directors' meeting in October 2021.

Dated Material: All proposals are due by Noon CDT on Tuesday, October 12, 2021. WFSDallas is not responsible for any technology issues. No faxed proposal will be accepted.

Workforce Solutions Greater Dallas is an equal opportunity employer/program. Auxiliary aids are available upon request, for persons with disabilities. TTY: 214-745-1054. 100% of funding received from the Texas Workforce Commission, including Federal Funds through the US Departments of Labor, Health, Education, Treasury and Agriculture; and non-governmental resources.

achieving competitive solutions ... for employers through quality people and for people through quality jobs.

Ross Tower, 500 N. Akard Street, Suite 3030 ■ Dallas, TX 75201 ■ www.wfsdallas.com ■ 214-290-1000 ■ Fax: 214-745-1110 ■ TDD 214-745-1054

Bidders' Conference

Bidders' Conference is scheduled for September 30th at 9:00 a.m. CDT. Please link to the bidders' conference at https://us02web.zoom.us/webinar/register/WN_pGujXHqGRGin4INrXCKI3A. Please submit any written questions regarding this RFQ to fiscal@wfsdallas.com prior to 8:00 a.m. CDT on September 30th. Bidders are welcome to ask additional questions during the bidders' conference. A copy of the Q&A, including questions from the conference and questions submitted in writing, will be posted at <http://www.wfsdallas.com/doing-business> on September 30th.

Letter of Authorization/Services Period

The letter of authorization as a result of this RFQ will be written after Board approval. WFSDallas may vary the time frame and/or extend the authorization period, contingent on satisfactory performance for up to three additional one year terms. The total terms of a letter of authorization to provide services shall not exceed four (4) years. WFSDallas reserves the right to terminate the letter of authorization annually or earlier based on provider performance and compliance with letter of authorization terms and conditions and/or for convenience.

Eligible Respondent

Proprietorships or organizations licensed in the State of Texas with the capability to provide services described within this RFQ and with the professional experience, a record of integrity and good business ethics (i.e., not debarred from doing business with state, federal or local government), are invited to respond.

Governing Provisions and Limitations

1. The main purpose of this RFQ is to ensure uniform information in the solicitation of proposals and procurement. This RFQ does not commit the WFSDallas to pay for costs incurred in the preparation of a response, or any other costs incurred prior to the execution of a formal agreement, unless such costs are specifically authorized in writing by the WFSDallas.
2. WFSDallas reserves the right to accept or reject any or all proposals received, to cancel and/or reissue this RFQ in part or its entirety.
3. WFSDallas reserves the right to correct any error(s) and/or make changes to this solicitation as it deems necessary.
4. All Board Directors, officers, and staff, or any agents of the Board are precluded from entertaining questions concerning the proposal or this procurement process outside the confines of the formal Questions and Answers process. Potential respondents, respondents and current provider of services are asked to respect these conditions by not making personal requests for assistance. No employee, member of a Board of Directors or other governing body, or representative of a respondent who submits a proposal under this RFQ may have any contact outside of the formal review process with any employee of WFSDallas, or any member of the Board of Directors for purposes of discussing or lobbying on behalf of respondent's proposal. This contact includes written correspondence, telephone calls, personal meetings, e-mail messages, or other kinds of personal contact. WFSDallas will reject proposals of those respondents who violate this condition.
5. WFSDallas reserves the right to contact any individual, agency employer, or grantees listed in a proposal, to contact others who may have experience and/or knowledge of the respondent's relevant performance and/or qualifications; and to request additional information from any and all respondents.
6. **Respondents shall not under penalty of law, offer or provide any gratuities, favors, or anything of monetary value to any officer, member, employee, or agent of the Board, for the purpose of having an influencing effect toward their own proposal or any other proposal submitted hereunder.**
7. **No Board Director, officer, or employee, or any agent of the Board shall participate in the selection, award or administration of a contract supported by Board funds if a conflict of interest, real or apparent, would be involved.**
8. **Respondents shall not engage in any activity, which will restrict or eliminate completion.** Violation of this provision may cause a respondent to be disqualified.

9. WFSDallas reserves the right to deem a proposal non-responsive or disqualify any proposal that, in its sole determination, does not comply with or conform to the terms, conditions, and/or requirements of this RFQ.
10. Public Disclosure of Proposal Information - this is a negotiated procurement utilizing the request for proposal method, and as such, the selection and award of a contract does not have to be made to the respondent(s) submitting the lowest priced offer, but rather to the respondent(s) submitting the most responsive proposal that satisfies the Board's requirements and is determined to be in the best interest of the Board.

Workforce Solutions Greater Dallas is a State of Texas appointed Local Workforce Development Board. Proposals submitted will not be returned and are subject to the Texas Public Information Act located in Chapter 552 of the Texas Government Code (the "PIA") and may be disclosed to the public upon request. Subject to the PIA, proposers may protect trade secret, proprietary and confidential information from public release. If a proposer does not desire proprietary or confidential information in its proposal to be disclosed, proposer is required to identify all proprietary or confidential information in its proposal. This identification must be done by individually marking each page with the words "Confidential Information" on which such proprietary or confidential information is found. If the proposer fails to identify confidential information, proposer agrees that, by submission of its proposal, those sections shall be deemed non-confidential and made available in response to any public request.

Proposers are advised that Workforce Solutions Greater Dallas, to the extent permitted by law, will protect the confidentiality of submitted proposals. However, proposers shall consider the implications of the PIA, particularly after the request for proposals process has ceased and the contract award has occurred. While provisions in the PIA may apply to protect confidential information, proposers are further advised that a determination on whether those standards have been met will not be made by Workforce Solutions Greater Dallas, but must be decided by the Office of the Attorney General of the State of Texas. In the event a request for public information is made, Workforce Solutions Greater Dallas will notify the proposer and the proposer may then request an opinion from the Attorney General pursuant to Section 552.305 of the Texas Government Code. Workforce Solutions Greater Dallas will not make a request for an opinion from the Texas Attorney General. Copyrighted proposals are unacceptable and are subject to disqualification as non-responsive.

Proposal Evaluation Process

WFSDallas assigns professional staff to read and evaluate each proposal. Parts of the scoring are scored independently by each reader; the final scores for those parts will be the average of the independent scores of all readers. In selecting proposal for letter of authorization/agreement, WFSDallas reserves the right to depart from the strict ranking by evaluation scores, whenever it deems such departure will better serve the best interests of WFSDallas and its constituents. WFSDallas may interview top scoring bidders before selecting.

Proposer Inquiry and Appeal Process

Workforce Solutions Greater Dallas is the responsible authority for handling complaints or protests regarding the procurement and proposal selection process. Please see the TWC Financial Manual for Grants and Contracts, Chapter 14, Procurement, and Appendix D, September 1, 2020. <https://wc.texas.gov/financial-manual-grants-contracts-chapter-14-procurement>

Respondents not selected by this process may appeal the decision by submitting, within 10 days of the Board notification of the procurement decision, a written request for debriefing to obtain information on the procurement process and how their proposal or offer was received and ranked. The Board shall acknowledge receipt of the Request for Debriefing in writing within 10 days of receipt, along with the date and time of the scheduled briefing. (NOTE: The Board extends the courtesy of offering a briefing to any respondent who is not selected for funding; the 10-day time frame must be adhered to only if a respondent is considering an appeal.) A copy of the complete appeal process will be provided upon request.

Services Solicited in this RFQ

Respondents to the RFQ must submit a proposal for the services requested below.

Healthcare Insurance for a Small Group

WFSDallas is seeking information for qualified, experienced and recognized insurance brokers to represent the WFSDallas in **healthcare coverage**.

Prospective bidders should offer comparable or improved healthcare insurance coverage for similar or lesser premiums, including technical support and customer service. Prospective bidders will provide the following to WFSDallas:

- Obtain medical from recognized healthcare insurance companies.
- Periodically update WFSDallas on changes in the insurance industry and recommendations.

Services not solicited for this procurement, include: Life Insurance, Dental and Long-Term Disability.

Selection Criteria:

Following is the point value for the evaluation criteria:

Demonstrated Competence	25
Respondent will demonstrate history of organization providing services, qualifications and experience, and licenses (if applicable) as referenced in this RFQ.	
Quality of Proposed Insurance Coverage	25
The respondent will propose services but not limited to, types of coverages that are requested in the RFQ that respondent will recommend for WFSDallas. The respondent will also describe all innovations or industry standards not presently covered.	
Cost	50
Cost/pricing of recommended coverage will be reviewed to determine that costs are reasonable. Costs will be compared to other bidders' proposed costs.	
Total Possible Points for Proposal Response	100

Response Checklist and Order of Submission

The attachments are provided to organize your reply. The proposal must be submitted in the following order:

Proposal Cover Sheet (Attachment A)

All items on the Proposal Cover Sheet must be completed. Identify a liaison or primary contact person, as well as the Signatory Authority.

Demonstrated Competence (Attachment B)

Briefly describe your experience in delivering the proposed services, qualifications and experience, and licenses (if applicable) as referenced in this RFQ include years of experience as broker for services on behalf of small businesses and non-profit organizations.

Please provide a list of three recent companies (other than WFSDallas) to which your company has provided proposed or similar services within the past three years (company name, street address, mailing address, contact person and title, phone and email.)

Proposed Coverage (Attachment C)

Describe services that will include, but are not limited to, types of coverages that are requested in the RFQ that respondent will recommend for WFSDallas. Coverage may be expressed in narrative or chart format. Prospective bidders should offer comparable or improved healthcare insurance coverage for similar or lesser premiums, including technical support and customer service. The respondent will also describe all innovations or industry standards not presently covered.

Cost (Attachment D)

Prospective bidders should offer comparable or improved insurance coverage for similar or lesser premiums. Coverage may be expressed in narrative or chart format. This cost must be all inclusive.