



## **REQUEST FOR QUALIFICATIONS RFQ 2018-60-2005 BROKER SERVICES**

Date Issued: September 6, 2018

Respond by: September 28, 2018

Contact: Erin Rea, Director of Strategic Planning and Procurement  
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Workforce Solutions South Plains (WSSP) is a 501(c)(3) Non-profit Corporation that administers workforce development services authorized by the Texas Workforce Commission for the 15-county South Plains Regional Workforce Development Area which consists of Bailey, Cochran, Crosby, Dickens, Floyd, Garza, Hale, Hockley, King, Lamb, Lubbock, Lynn, Motley, Terry and Yoakum Counties. Through this Request for Qualifications (RFQ), WSSP will procure, from qualified insurance brokers, Broker Services with a consultative approach in finding solutions to insurance challenges. beginning November 1, 2018 with a one-year option for a max five-year contract.

All interested parties submit information to WSSP at the following address:

Workforce Solutions South Plains Board Administration  
1301 Broadway, Ste. 201  
Lubbock, TX 79401  
Attn: Erin Rea, Director of Strategic Planning and Procurement  
Phone: 806.744.1987  
Fax: 806.744.5378  
[erin.rea@spworkforce.org](mailto:erin.rea@spworkforce.org)

### **Purpose of the Request for Qualifications:**

WSSP is requesting quotes from qualified insurance Brokers who will annually procure health benefits and business insurance policies that are required to carry out the management and operation of WSSP. The Broker must have the experience and qualifications necessary to secure insurance policies such as health insurance, dental coverage, vision coverage, life insurance, workers' compensation insurance, general liability insurance, automobile insurance, errors and omissions insurance, and fidelity bonding.

WSSP has federal and state compliance requirements for the procurement of all insurance policies and benefit plans, which will require the Broker to keep detailed records of its

advertisement, procurement and selection process. It will be necessary to show the selection criteria and the rationale used to select the policy.

An understanding of WSSP's needs and a consultative approach is necessary to find solutions for our organization and provide advice to support decision-making. We expect the Broker to provide the following:

- 1) knowledge and tools to manage benefits plans, costs, communication strategies, and compliance obligations more effectively;
- 2) information on upcoming changes needed health care legislation; and
- 3) creative solutions to any insurance issues that may arise.

WSSP currently has the following insurance policies and benefits in place:

- 1) Auto - Business
- 2) EDC Equipment and Software
- 3) Business Owners Policy
- 4) Crime Policy
- 5) Workers Compensation
- 6) Directors and Officers Liability
- 7) Group Insurance (Medical, Vision, Dental, Life, Short-Term Disability, and Long-Term Disability)

Respondents are asked to specify the types of insurance(s) they are qualified to obtain. Each quote submitted shall contain a detailed cost proposal including the cost of Broker fees and any other cost associated with the requested Broker Services. Respondents are required to itemize all costs that may be associated with the requested service. Each quote submitted shall contain a copy of the Respondent's Broker Certification(s) and Broker License(s).

Please contact Erin Rea at [erin.rea@spworkforce.org](mailto:erin.rea@spworkforce.org) or call 806-744-1987 to set up an appointment or receive more information.

### **CONDITIONS AND LIMITATIONS**

- A. The only purpose of this Request for Qualifications (RFQ) is to ensure uniform information in the solicitation of proposals and procurement of services. This RFQ is not to be construed as a purchase agreement or contract or as a commitment of any kind; nor does it commit the Board to pay for costs incurred prior to the execution of a formal contract unless such costs are specifically authorized in writing by Board.
- B. The Board reserves the right to accept or reject any or all proposals received, to cancel or reissue this RFQ in part or its entirety.
- C. The Board reserves the right to negotiate the final terms of all contracts or agreements with offeror(s) selected.
- D. Misrepresentation of the offeror's ability to perform as stated in the proposal may result in cancellation of any contract or agreement awarded.
- E. Offerors 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 having an influencing effect toward their own proposal or any other proposal submitted hereunder.
- F. No employee, officer, member or agent of the Board shall participate in the selection, award or

- administration of a contract if a conflict of interest, or potential conflict, would be involved.
- G. Offerors shall not engage in any activity that will restrict or eliminate competition. Violation of this provision may cause an offeror's proposal to be rejected. This does not preclude joint ventures or subcontracts.
  - H. Any offeror may withdraw his proposal either in person or by written request by a duly authorized representative at any time prior to the scheduled closing time for receipt of proposals.
  - I. No contract may be awarded until the offeror has complied with Executive Order 12549, 29 CFR, Part 98 by submitting to the Board a signed Certification of Debarment, which states that neither the offerors, nor any of its principals, are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in a procurement by any Federal department or agency.
  - J. The Board's Director of Operations is the responsible authority for handling complaints or protests regarding the procurement and proposal selection process. No protest shall be accepted by the State until all administrative remedies at the Board level have been exhausted.
  - K. Offerors not selected by this process may appeal the Board decision by submitting in writing a formal letter of appeal addressed Director of Operations, Workforce Solutions South Plains, 1301 Broadway, Ste 201, Lubbock, Texas, 79401. This appeal must be sent by registered mail and identified on the envelope as an appeal with the grounds of the appeal clearly stated in the letter, within fourteen calendar days of decision notification (the date on the notification letter). The Director of Operations shall review the appeal and review applicable laws, and request determination if appeal is valid and shall make decisions. If persons are not satisfied with the decision they may pursue all other avenues of appeal provided by law.
  - L. Any material that is to be considered as confidential in nature must be clearly marked as such and will be treated as confidential by the Board to the extent allowable in the Public Information Act.
  - M. Funding for goods or services requested in this RFQ is contingent upon the Board's actual receipt and availability of funds from the Texas Workforce Commission.
  - N. Workforce Solutions South Plains is an equal opportunity employer and complies fully with the nondiscrimination and equal opportunity provisions of the following laws: Section 188 of the Workforce Innovation and Opportunity Act (WIOA), which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and against beneficiaries on the basis of either citizenship status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIA Title I- financially assisted program or activity; Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color and national origin; the Americans with Disabilities Act (ADA) and the Americans with Disabilities Act Amendment, Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities; the Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs.