

**ESCAMBIA COUNTY
FLORIDA**

REQUEST FOR QUALIFICATIONS

BENEFITS BROKER/CONSULTANT

SPECIFICATION NUMBER PD 16-17.094

BIDS WILL BE RECEIVED UNTIL 2:00 PM CST, NOVEMBER 14, 2017

Office of Purchasing, room 11.101
213 Palafox Place, Pensacola, FL 32502
Matt Langley Bell, III Building
Post Office Box 1591
Pensacola, FL 32591-1591

Board of County Commissioners

Douglas Underhill, Chairman
Jeff Bergosh, Vice Chairman
Steven Barry
Lumon J. May
Grover Robinson, IV

**From:
Paul R. Nobles
Purchasing Manager**

Assistance:

Jeffrey Lovingood
Purchasing Specialist
Office of Purchasing
2nd Floor, Matt Langley Bell, III Building
213 Palafox Place
Pensacola, FL 32502
Telephone: 850-595-4953
E-Mail: JDLovingood@myescambia.com

SPECIAL ACCOMODATIONS:

Any person requiring special accommodations to attend or participate, pursuant to the Americans with Disabilities Act, should call the Office of Purchasing (850-495-4980) at least five (5) working days prior to the solicitation opening

Notice

It is the specific legislative intent of the Board of County Commissioners that NO CONTRACT under this solicitation shall be formed between Escambia County and the awardee vendor until such time as the contract is executed by the last party to the transaction.

**ESCAMBIA COUNTY, FLORIDA
REQUEST FOR QUALIFICATIONS
BIDDER'S CHECKLIST
BENEFITS BROKER/CONSULTANT
SPECIFICATION PD 16-17.094**

HOW TO SUBMIT YOUR BID:

Please review this document carefully. Offers that are accepted by the County are binding contracts. **Incomplete bids are not acceptable.** All documents and submittals shall be received by the Office of Purchasing on or before the date and hour specified for receipt. Late bids will be returned unopened.

** Documents submitted with Bids are to be on the forms provided in the Request for Qualifications and photocopies of other required documents.*

THE FOLLOWING DOCUMENTS SHALL BE RETURNED WITH THE BID:

- Solicitation, Offer, and Bid Form. The Bid Form must contain an original signature in indelible ink. Bids with photocopies or scanned signatures will not be accepted.
- Bid Surety (bond, check, etc.)

THE FOLLOWING DOCUMENTS SHOULD BE RETURNED WITH THE BID:

- Sworn Statement Pursuant to Section 287.133(3)(A), Florida Statutes on Entity Crimes.
- Drug-Free Workplace Form.
- Information Sheet for Transactions and Conveyances Corporate Identification.
- Certificate of Authority to do Business from the State of Florida.
- Occupational License.
- Florida Department of Business and Professional Regulation – License(s), Certification(s), and/or Registration(s).
- Public Records Exemption of Building Plans

BEFORE YOU SUBMIT YOUR BID, HAVE YOU:

Placed your bid with all required submittal items in a sealed envelope, clearly marked for specification number, project name, name of bidder, and due date and time of bid receipt?

THE FOLLOWING DOCUMENTS ARE REQUIRED UPON NOTICE OF AWARD:

- Certificate of Insurance
- Payment and Performance Bonds

**This form is for your convenience to assist in filling out your bid.
Do not return this form with your bid.**

**REQUEST FOR QUALIFICATIONS
BENEFITS BROKER/CONSULTANT
PD 16-17.094**

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Forms marked with an (* Asterisk) must be returned with the Bid.

Forms marked with a (** Double Asterisk) should be returned with the Bid.

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Part I General Information

All submittals to be considered shall be in the possession of the Office of Purchasing prior to the time of the solicitation closing. Submittals of proposals may be mailed to 213 Palafox Place, 2nd Floor Room 11.101, Pensacola, Florida 32502 or delivered to the Office of Purchasing, 2nd floor, Room 11.101, Matt Langley Bell, III Bldg., 213 Palafox Place, Pensacola, Florida 32502, in a **sealed envelope clearly marked:**

"Specification Number PD 16-17.094, Benefits Broker / Consultant." Additionally, the envelope should be clearly marked with the Name of Submitting Firm, Time and Date Due. **Note:** If you are using a courier service (USPS, FedEx, UPS, etc.), you must mark the airbill and envelope or box with this information.

Regardless of the method of delivery, each submitter shall be responsible for their submittal being delivered on time as the County assumes no responsibility for same. Submittals received after the time set for the solicitation closing will be rejected and returned unopened to the submitter.

The Board of County Commissioners, Escambia County, Florida, invites your company to respond to a Request for Qualifications on the item(s) as listed in this solicitation request.

All terms and conditions below are a part of this request, and no offer will be accepted unless all these conditions have been complied with. The County reserves the right to waive informalities in any offer; to reject any or all offers, in whole or in part, and/or to accept the offer(s) that in its judgement is from the lowest, most responsible, and responsive Offeror(s).

Instructions to Offerors

1. General Information

The Following Policy will apply to all methods of source selection:

A. Conduct of Participants

After the issuance of any solicitation, all bidders/proposers/protestors or individuals acting on their behalf are hereby prohibited from **lobbying** as defined herein or otherwise attempting to persuade or influence any elected County officials, their agents or employees or any member of the relevant selection committee at any time during the **blackout period** as defined herein; provided, however, nothing herein shall prohibit bidders/proposers/protestors or individuals acting on their behalf from communicating with the purchasing staff concerning a pending solicitation unless otherwise provided for in the solicitation or unless otherwise directed by the Purchasing Manager.

B. Definitions

Blackout Period means the period between the time the bids/proposals for invitations for bid or the request for proposal, or qualifications, or information, or requests for letters of interest, or the invitation to negotiate, as applicable, are received at the Escambia County Office of Purchasing and the time the Board

awards the contract and any resulting bid protest is resolved or the solicitation is otherwise cancelled.

Lobbying means the attempt to influence the thinking of elected County officials, their agents or employees or any member of the relevant Selection Committee for or against a specific cause related to a pending solicitation for goods or services, in person, by mail, by facsimile, by telephone, by electronic mail, or by any other means of communication.

C. Sanctions

The Board may impose any one or more of the following sanctions on a non-employee for violations of the policy set forth herein:

- 1) Rejection/Disqualification of Submittal,
- 2) Termination of Contract; or
- 3) Suspension or Debarment as Provided in Sec. 46-102 of the Escambia County Code of Ordinances.

This policy is not intended to alter the procedure for Protested Solicitations and Awards as set forth in the Sec. 46-101 of the Escambia County Code of Ordinances.

2. Project Background

This is a request for interested persons/firms to submit their credentials and qualifications to the Escambia County Human Resources Department for consideration during a consultant qualification process. Qualifications are requested for the purpose of determining a consultant/broker for services listed below. This is not an agent of record solicitation.

- A. Escambia County, Florida is located in Northwest Florida, and Pensacola is the County's principal city. The County has approximately 1,800 employees, 600 retirees eligible for various plans, with current healthcare plans covering over 4,000 lives. In addition, the Escambia County Health Clinic (Clinic) serves the Sheriff's department, adding an additional 700 employees, 40 retirees, and over 1,700 lives.
- B. Escambia County is self-funded for health through Florida Blue, and through Delta Dental for dental services. TPA and MCA services are not solicited herein.
- C. Depending on the type of coverage, the Escambia County, Florida program covers the Board of County Commissioners (BCC), the County's four (4) elected Constitutional Officers, and four (4) subordinate agencies. These include the Clerk of Circuit Court, the Property Appraiser, the Supervisor of Elections, the Tax Collector, the Santa Rosa Island Authority, the Escambia County Pensacola Human Relations Council, the Escambia County Finance Authority, the Escambia County Health Authority, the Escambia County Sheriff, and retirees.
 1. Health, Dental, Vision, and Life Insurance are provided to all entities except the Sheriff.
 2. AD&D, Long-Term Disability (voluntary), Flexible Spending to include Dependent Care, and Voluntary Insurance are provided to all entities

except the Sheriff and retirees.

3. Health Clinic includes:
 - a. All entities eligible for the County's health plan and have other health coverage.
 - b. Retirees that have group health coverage and are not covered under Medicare through the County, including the Sheriff.
4. Benefit Advisory Services are for all entities except the Sheriff.

3. **Scope of Services**

The selected person(s)/firm shall provide brokerage services and, under the direction of the Escambia County Human Resources Manager:

- A. Act as the Consultant of Record for the Escambia County Board of County Commissioners to obtain and maintain insurance coverage with qualified carriers that provide the most cost effective approach to managing the County's operational risk.
- B. Act in an advisory capacity regarding up-to-date laws relating to all benefits programs.
- C. Assist in sourcing the best options for the County to pursue regarding plan design, plan funding, and alternatives to ensure cost effectiveness as laws and requirements change.
- D. Assist the County Human Resources department throughout the year with necessary evaluations of benefits programs and the clinic to minimize costs and risks while ensuring compliance.
- E. Specific Performance:
 1. Claims audits for self-funding accounts on a bi-annual basis, or upon request.
 2. Self-funding actuary support for all plans and submit required documents regarding federal and state laws.
 3. Provide support in the preparation and review of benefit plan RFP/RFQs.
 4. Provide legal guidance regarding legislation issues including, but not limited to, the Affordable Care Act, and the impact the legislation has on benefits.
 5. Assist in the preparation and distribution of all required documentation needed to support federal and state laws such as SPD, plan documents, notifications (HIPPA, SBP, SBC, ACA, GINA, etc.).
 6. Demonstrate an understanding of issues specific to public-sector Human Resources departments, especially with regard to county and municipal entities in Florida.

7. Provide a response time of less than twenty-four (24) hours to inquiries for benefits and insurance consultation.
8. Attend meetings with the BCC and staff on an as-needed basis throughout the year and no less than once per quarter, possibly in person.
9. Assist the County 150-180 days in advance of renewals by giving estimates of renewal changes in premium, coverage, policy terms, etc. And in collecting necessary renewal rating and background information.
10. Assist in increasing the effectiveness of existing educational resources available to employees and retirees on how to best utilize the County's benefits plans.
11. Assist the County in achieving the goal of improving employee wellness outcomes through an emphasis on preventative healthcare.
12. Research and coordinate data that will aid the County's efforts to control costs while offering well-designed benefits plans that best serve County employees and retirees.
13. Assist the County by increasing the effectiveness of existing educational resources available to employees and retirees regarding how to most efficiently utilize the County benefit plans.

The County may suggest revision to the Scope of Service, highlighting or de-emphasizing certain facets or activities, as the County's priorities emerge and new information becomes available.

4. Award

The County reserves the right to accept or reject any and all qualifications, and to make award to the lowest most responsive and most responsible Offeror or one whose qualifications meet the requirements and criteria set forth in this Request for Qualifications and whose award will, in the opinion of the County, be in the best interest of and most advantageous to the County.

5. Contract Term

The contract term will be effective for the period January 1, 2018 through December 31, 2018. The contract may be renewed for additional twelve (12) month periods, up to a contract maximum of thirty-six (36) months upon mutual agreement of both parties. If any such renewal results in changes in the terms or conditions, such changes shall be reduced to writing as an addendum to this contract and such addendum shall be executed by both parties and approved by the Board of County Commissioners.

Renewal of the Contract shall be subject to appropriation of funds by the Board of County Commissioners.

Any renewal will, in part, be dependent upon acceptability of the cost and quality of service, provider ability, and market conditions. The County reserves the right to remove the consultant for one or more types of coverage when it is believed to be in the County's best interest to solicit such coverage from one or more parties involving other consultants.

6. **Procurement Questions**

Procurement questions may be directed to Jeffrey Lovingood, Purchasing Specialist, 850-595-4953, JDLovingood@myescambia.com. All questions shall be submitted in writing to the email address above by 5:00 PM CDT November 09, 2017.

Part II **Information Required from Submitters**

1. **Format and Content**

The County discourages overly lengthy and costly responses, however, in order for the County to evaluate qualifications thoroughly and fairly, submitters should follow the format set out herein and provide all of the information requested.

Submitters shall include the complete name and address of the firm, as well as the name, mailing address, and telephone number of the firm's contact for the County regarding the submittal. **Please provide one (1) complete paper copy and one (1) complete electronic copy (CD or thumb drive are acceptable).**

2. **Requirements**

The firm selected from the qualified respondents will be an established, experienced organization with a strong history of representing large clients or public entities as it's Consultant of Record for the purposes of procuring insurance of all types as defined herein.

Provide a statement of the firm's qualifications. Explain how the firm is organized and how its resources will be utilized on the County's behalf. Include, as a minimum:

- A. Staff names, résumés, professional credentials, experience, and a list of current clients.
- B. Identify the individual(s) available to work directly with Escambia County.
- C. Include a summary of the firm's work and professional experience relative to the Scope of Services contained herein, and document some relative experience.
- D. Provide a list of the firm's government clients, years of experience, as well as types of experience with those entities, identified by the types of insurance (i.e. health, dental, long-term disability, vision, life, Section 125, etc.). Please include the entity's contact person, telephone number, and email address as they may be contacted for reference.
- E. Highlight the firm's degree of accessibility to Pensacola, Florida.
- F. Provide any relevant qualifications and experience over and above the minimum required which the firm considers to be significant, innovative, or otherwise relevant to the County's consideration in regarding to this Request for Qualifications.
- G. The prospective Benefits Broker / Consultant must make an affirmative statement to the effect that their selection shall not result in a Conflict of Interest. Should any potential or existing conflict be known by a prospective Benefits Broker / Consultant, said individual(s) or firm(s) must specify the party with the conflict exists or may

arise, the nature of the conflict or potential conflict, and whether the individual(s) or firm(s) in conflict would or would not step aside or resign from that engagement or representation creating the conflict in favor of the County. Prospective Benefits Broker / Consultant must also agree to comply with the County's ordinance prohibiting Conflicts of Interests among retained consultants (see Exhibit C).

A review of the firm's potential conflict of representation is an important factor and will be considered by the County in the selection of the Benefits Broker / Consultant. The Benefits Broker/Consultant shall further agree that it shall not represent any third party in any lawsuit in which the County is named as an adverse party.

- H. The engagement of certain professional services, including those requested by the Request for Qualifications, is exempt from the provisions of the Administrative Procedure Act, Chapter 120, Florida Statutes, as amended, and, therefore, are not to be subject to the appeal process therein described at any time during the solicitation or selection period.

Escambia County reserves the right to accept or reject any submission of qualification.

Part III Selection Process and Criteria for Selection Process

1. Review Process

The qualifications review process will be initiated by the Office of Purchasing. The Human Resources Department will establish a Selection Review Committee. The Committee will review the qualifications submitted and select a qualified firm(s), based on the criteria shown below, to begin the process of negotiations in an effort to find a Consultant of Record for insurance procurement for Escambia County.

2. Selection Criteria

Criteria	Maximum Score
Qualifications	30
Experience	30
Technical Approach	20
Cost	20
Maximum Possible Score	100

Part IV Schedule

The Following schedule is proposed and shall be considered tentative and may be followed as practical in all actions related to this procurement:

Mailing Date of Request for Qualifications:	October 30, 2017
Deadline for Submitting Qualifications:	November 14, 2017 by 2:00 PM CST
Short-List Meeting:	November 21, 2017
Discussion, Ranking Meeting:	November 28, 2017
Written Scope Due to Committee for Review:	December 06, 2017
Fee Proposal Due to Committee for Review:	December 13, 2017
1 st Negotiation with First Ranked Firm:	December 18, 2017
2 nd Negotiation with First Ranked Firm:	December 20, 2017
Board of County Commissioners Approval:	January 04, 2018

Note: Per Florida Statute 119.071, General exemptions from inspection or copying of public records 2. Sealed bids, proposals, or replies received by an agency pursuant to a competitive solicitation are exempt from s. [119.07](#)(1) and s. 24(a), Art. I of the State Constitution until such time as the agency provides notice of an intended decision or until 30 days after opening the bids, proposals, or final replies, whichever is earlier.

Public Records of this solicitation will not be available until **December 15, 2017**.

**PD 16-17.094 BENEFITS BROKER / CONSULTANT
EXHIBIT B**

Qualifications Questionnaire

1. Broker/Consultant Name:
2. Firm Name:
3. Address:
4. Telephone:
5. Email:

Agent Qualifications & Experience

6. How many years have you been a broker/consultant?
7. How many years have you been with your present firm?
8. Have you attached background information on yourself (e.g. résumé, C.V.)?
9. Do you have special professional qualifications or professional designations?
10. What is your experience with medical insurance benefit plans of similar or greater size, complexity and magnitude?
11. What is your experience with medical insurance benefit plans for public entities, especially county government entities in Florida, of similar or greater size, complexity, and magnitude?
12. What is your experience in optimizing returns for employer sponsored health clinics?
13. What experience do you have assisting clients in streamlining enrollment processes?
14. What experience do you have assisting clients in drafting benefit communications?
15. What experience do you have assisting clients in optimizing HDHP & HSA plan design?
16. What experience do you have in using data to assist clients in developing wellness programs?
17. How many public entities do you service in the state of Florida?
18. Are you experienced with all the items in the Scope of Services? If not, explain.

Commitment to Customer Services

19. What is your commitment to County service, including frequency of contact, availability for meeting with staff, committees, etc.?
20. Will you commit to proactive and aggressive pursuit of negotiation of favorable policy terms, conditions and pricing, benefits and servicing of insurance coverage?
21. Provide examples of such proactive and aggressive negotiations, etc.

Firm Qualifications

22. What size is your agency's local office, in number of professionals and non-professionals that will serve the County?
23. Which Florida office of your firm will provide the ongoing services to the County?
23. Will any other office(s) be involved and, if so, to what extent? Be specific.
24. How many years has the firm been in business?
25. What is your firm's experience with medical insurance benefit plans for groups of similar or greater size, complexity and magnitude?
26. What is your firm's experience with medical insurance benefit plans for other public entities of similar or greater size, complexity and magnitude?
27. What is your firm's experience with employer sponsored health clinics?
28. How many public entities does your firm service?

- 29. Have you provided background information on the range of your firm's services?
- 30. Are the key persons designated to service the County's account appropriately licensed by the State of Florida? Please list the following:
- 31. Have you attached details of the experience of those persons (non-licensed personnel you intend to assign) with accounts and/or public entities with similar size and complexity as the County?
- 32. State the amount of errors and omission insurance for the firm and the name of the insurer.

Remuneration/Services Included

- 33. State your total remuneration (as commission, maximum commission, etc.) for all the services you will provide that are related to the scope of services. Is the remuneration negotiable?
- 34. For how many years are you willing to guarantee this level of remuneration?
- 35. Do you understand that the County expects costs to be commensurate with the services provided?
- 36. Provide your estimate of the number of hours of service that you expect to provide to the County for the remuneration received.
- 37. Explain how this represents good value to the County.
- 38. Will you provide the full scope of Broker/Consultant services as outlined in the RFQ?
- 39. Do you understand that the contract term will be a one (1) year term year with the maximum capacity of two (2) one-year extensions?
- 40. Is your proposed remuneration inclusive of the full scope of services to be provided throughout the year, including those related to the following year's renewal? To what extent are there also fees to be additionally charged for services? Explain.
- 41. Will you agree not to accept any insurer offers to pay incentive remuneration, contingency commissions, bonuses, overrides or other forms of additional income to you or your firm?
- 42. Do agree to allow and pledge full cooperation to the County if, at its option, the County desires an audit regarding the County's expenditures for the insurance program and all related remuneration to the agency and agents and others involved?
- 43. Do you agree to disclose all compensation of any sort received by your firm from any proposer?

Reasons for Broker/Consultant Selection/Uniqueness/Special Advantages

- 44. Reasons for the County qualifying you and your firm: Describe below and/by attachment the key reasons you and your firm should be qualified by the County to be the broke/consultant. Emphasize issues that make you and or the firm unique, or give you/it special advantages over other submitters and how these are of value to the county for its benefits programs. Attach any supplemental documentation you think is relevant to being selected.