



Brownsville Independent School District

Agenda Category: Bids/Proposals/Purchases Board of Education Meeting: 05/07/19

Item Title: RFP# 19-133 Consultant to Conduct Insurance X Action
Audit Information
Discussion

BACKGROUND:

The purpose of this agenda is to recommend to the Board of Trustees the firm that will provide the best value as the Consultant "to help guide the district in reviewing options related to our employee benefits program."

As directed by the Board Insurance Committee, proposals were reviewed and a consultant was selected. This recommendation was made based on the review of proposals in the areas defined in the Request for Proposals: Consulting Services, Licenses / Credentials, Industry & Consulting Experience, References, Errors & Omission Coverage and Price.

Thirty-seven (37) vendors were solicited, Eleven (11) proposals were received, One (1) no bid.

FISCAL IMPLICATIONS:

Local Maintenance Funds not to exceed \$25,000.00

RECOMMENDATION:

Recommend awarding RFP# 19-133 Consultant to conduct Insurance Audit to Gallagher Benefits of Weslaco, Texas as recommended by administration for an Annual Price not to exceed \$25,000.00.


Micaela Escobar/ Delia Rodriguez
Submitted by: Administrator/Purchasing Interim Adm.

Approved for Submission to Board of Education:

Sylvia R. Hatton, Ph.D.
Interim Superintendent

/Mary D. Garza
Recommended by: AA Supt./Asst. Supt./ Interim CFO

When Necessary, Additional Background May Follow This.



Brownsville Independent School District
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(956) 548-8361 Fax (956) 548-8367

Dr. Sylvia Hatton
Interim Superintendent of Schools

To: Nick Long
Gallagher Benefits

From: Delia Rodriguez, CTSBO, CTPM
Interim Purchasing Administrator

Date: April 18, 2019

RE: (BAFO) Best and Final Offer for RFP #19-133
Consultant to Conduct Insurance Audit

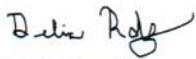
The original RFP requested insurance consulting services to include an audit of all employer paid insurance products; however, at this time BISD is looking for an insurance consultant "to **(only)** help guide the district in reviewing options related to our employee insurance benefits program".

Please accept this request for a Best and Final Offer. Your company has been qualified as a proposer to the referenced RFP based on evaluation of your response to the RFP being judged acceptable or reasonably susceptible to being made acceptable. You are invited to submit your Best and Final Offer for consideration in the award determination.

As part of the BAFO, the proposer may modify the initial offer; update pricing based on any changes the agency has made; and include any inducements that will improve the overall evaluation of the RFP.

This BAFO must be authenticated by an officer of your company who is authorized to bind the company to the contract. The signature on the transmittal letter for the BAFO will serve as authentication. Transmittal shall be received no later than 11 AM, Tuesday, April 23, 2019.

Should you have any questions regarding this matter, please e-mail to dnrodriguez@bisd.us


Delia Rodriguez, CTSBO, CTPM
Interim Purchasing Administrator



Gallagher

Insurance | Risk Management | Consulting

To Whom It May Concern:

Please find the attached Best And Final Offer (BAFO) from Arthur J Gallagher & Co. We have refined our services to offer a limited scope as requested and moved the other services to optional. The District may choose to opt in to these optional services at any time in the future within the first three years of the contract.

Please let me know if you have any questions.

Nick Long

Area Vice President, Public Sector

281-773-8954

Nick_long@ajg.com



Insurance | Risk Management | Consulting

Revised Price

CORE SERVICES

Item	Service	Cost
1	Employee Benefit Plan Consulting	Included
2	Discount Analysis	Included
3	Renewal Projections & Rate Structure Analysis	Included
4	Actuarial Assistance	Included
5	Underwriting Assistance	Included
6	Unlimited Compliance Support	Included
7	Network Negotiation & Consulting	Included
8	Annual Texas ISD Benchmark Report	Included
9	Level 1 Rx Consulting	Included
10	RFP Creation & Analysis	Included
11	Voluntary Benefits Consulting	Included
Total Annual Price		\$25,000
	3 Year Price Guarantee	Included

ADDITIONAL SERVICES

Item	Service	Cost
1	Texas Education Collective	\$0.75 per script
2	Custom Mobile Benefits App	\$2.50 PEPM
3	Benefit Advocacy Center	\$1.00 PEPM
4	Data Warehouse	\$1.00 PEPM
5	Enhanced Reporting Package	Included with Data Warehouse
6	Utilization Review Consulting	Included with Data Warehouse
7	Stop Loss Oversight & Monitoring	\$20,000
8	Enhanced Rx Consulting	\$50,000
9	IBNR Reports	\$10,000
10	Wellness Consulting	\$20,000
11	Statistically Valid Random Sample Audit	\$40,000
12	100% Rx Claim Audit	\$40,000
13	Custom BenefitsConnect Enrollment System	\$2.25 PEPM or Subsidized by Voluntary Carriers



BISD PURCHASING DEPARTMENT
PRELIMINARY CONTACT TO VENDORS REGARDING OUR BIDS

COMPANY NAME	CITY	BID	NOTIFIED VENDOR	REC'D BIDS
ARTHUR J /GALLAGHER BENEFIT SERVICES	WESLACO	19-133	Y	Y
ARTHUR J. GALLALHER RISK MANAGEMENT SERVICES	HARLINGEN	19-133	Y	N
CARLISLE INS - ACRISURE LLC DBA CARLISLE INS	CORPUS CHRISTI	19-133	Y	Y
CLAIM TECHNOLOGIES INC	DES MOINES	19-133	Y	NO BID
COKINOS BOSIEN AND YOUNG	SAN ANTONIO	19-133	Y	N
CRYSTAL & COMPANY	SAN ANTONIO	19-133	Y	N
EBC, A THRELKELD BENEFIT PARTNERS	TYLER	19-133	Y	Y
ETHOS BENEFIT SERVICES	WACO	19-133	Y	N
EVERARDO GARCIA	BROWNSVILLE	19-133	Y	N
FINANCIAL BENEFIT SERVICES	RICHARDSON	19-133	Y	Y
GALLAGHER BENEFIT SERVICES, INC.	WACO	19-133	Y	N
GARZA LONG GROUP	WESLACO	19-133	Y	N
GMFE GROUP,LLC d/b/a GEF FINANCIAL GROUP	BROWNSVILLE	19-133	Y	N
GUSTAVO L. ACEVEDO, JR	PHARR	19-133	Y	N
HIGGINBOTHAM-INSURANCE AND RISK MANAGEMENT	FORT WORTH	19-133	Y	N
HOLMES MURPHY & ASSOCIATES, INC.	DALLAS	19-133	Y	N
HONESTX CONSULTING	SOUTHLAKE	19-133	Y	Y
HUB INTERNATIONAL	EL PASO	19-133	Y	Y
JETT FINANCIAL GROUP	EDINBURG	19-133	Y	Y
LAW OFFICE OF JACQUES TREVINO	EDINBURG	19-133	Y	N
LINEBARGER GOGGAN BLAIR & SAMPSON, LLP	BROWNSVILLE	19-133	Y	N
LOCKTON COMPANIES (LOCKTON-DUNNING SERIES)	DALLAS	19-133	Y	Y
McCREARY,VESELKA,BRAGG & ALLEN,P.C	ROUND ROCK	19-133	Y	N
MCGRIFF, SEIBELS & WILLIAS OF TEXAS, INC.	ADDISON	19-133	Y	N
MULLEN PENSION AND BENEFITS GROUP	SAN ANTONIO	19-133	Y	N
NEW YORK LIFE INSURANNC E CO.	HARLINGEN	19-133	Y	N
O'HANLON & ASSOCIATES	AUSTIN	19-133	Y	N
OXFORD, OXFORD GONZALEZ	EDINBURG	19-133	Y	N
ROCKHOUSE FINANCIAL GROUP		19-133	Y	N
ROYSTON, RAZOR, VICKERY & WILLIAMS	BROWNSVILLE	19-133	Y	N
SANCHEZ, WHITTINGTON, JANIS & ZABARTE, L.L.P.	BROWNSVILLE	19-133	Y	N
SWBC EMPLOYEE BENEFITS	SAN ANTONIO	19-133	Y	Y



BISD PURCHASING DEPARTMENT
PRELIMINARY CONTACT TO VENDORS REGARDING OUR BIDS

COMPANY NAME	CITY	BID	NOTIFIED VENDOR	REC'D BIDS
CONSULTING				
TASB - TEXAS ASSOC.	AUSTIN	19-133	Y	N
THE GRANADO GROUP	CORPUS CHRISTI	19-133	Y	N
VALLEY RISK CONSULTING	MCALLEN	19-133	Y	Y
VISICOR	FRIENDSWOOD	19-133	Y	N
WETHE & ASSOCIATES	DALLAS	19-133	Y	N

Count:

37

**Brownsville Independent School District
 Department of Employee Benefits and Risk Management
 Request for Proposal # 19-133 - Consultant to Conduct Insurance Audit**

New Scope of Work - Insurance Consultant "to help guide the district in reviewing options related to our employee insurance benefits program"

		VENDOR SCORING			
		Amanda Barnes / Lockton Dunning Series	Arthur Gallagher & Co.	Carlise Insurance / Acrisrue	Claim Technologies Inc.
Criteria	Points	Score	Score	Score	Score
Consulting Services	30	15.33	27.00	23.00	No bid
Licenses / Credentials	20	5.00	17.33	14.00	
Industry & Consulting Experience	20	9.00	17.33	17.00	
References	10	5.33	8.33	5.66	
Errors & Omission Coverage	5	3.33	5.00	2.33	
Price	15	1.00	11.66	10.00	
Overall Points	100	38.99	86.65	71.99	

		VENDOR SCORING			
		EBC, A Threlkeld Partner	Financial Benefits Services	HonestRx Consulting	Jett Financial Group, LLC
Criteria	Points	Score	Score	Score	Score
Consulting Services	30	22.33	13.00	Committee did not rank. Company only offers pharmacy services.	16.00
Licenses / Credentials	20	8.66	10.00		13.33
Industry & Consulting Experience	20	13.33	12.66		4.00
References	10	4.00	5.00		5.00
Errors & Omission Coverage	5	4.00	-		2.66
Price	15	0.66	2.00		6.66
Overall Points	100	52.98	42.66		0.00

		VENDOR SCORING		
		Randy McGraw / HUD International	SWBC Consulting Group	Valley Risk Consulting
Criteria	Points	Score	Score	Score
Consulting Services	30	23.00	16.33	24.33
Licenses / Credentials	20	18.33	13.33	13.33
Industry & Consulting Experience	20	15.00	9.33	13.33
References	10	6.66	6.66	8.33
Errors & Omission Coverage	5	5.00	-	5.00
Price	15	4.00	1.00	5.66
Overall Points	100	71.99	46.65	69.98

Vendor Selected	Arthur Gallagher & Co.
Committee Members	George Saenz, EBC Chair / High School
	Rosa Pones, EBC Member / Health Services
	Victor Caballero, EBC Member / Elementary School