



## UNITED INDEPENDENT SCHOOL DISTRICT AGENDA ACTION ITEM

**Topic:** Consideration for approval of RFCQ CQ020-2011, Employee Benefits Insurance Consulting Services

**Submitted by:** Cordelia Jackson / Roberto Chapa      **Of:** Director of Purchasing / Risk Management

**Approved for transmittal to school board:** January 18, 2012

**Recommendation:**

Administration brings for your approval Request for Competitive Quotation (RFCQ) CQ020-2011 Employee Benefits Insurance Consulting Services and recommends award to Wethe & Associates Inc. as the company providing the best value.

**Rationale:**

Staff has complied with all applicable federal, state and local purchasing policies and procedures in obtaining pricing information for the items listed above. Staff is recommending the award based on being the best value to the district.

**Budgetary Information:**

The budget includes the funds for these purchases

**Board Policy Reference and Compliance**

CH local – purchasing and acquisition

Texas education code 44.031



# UNITED INDEPENDENT SCHOOL DISTRICT

Robert Chapa  
Director of Risk Management

December 1, 2011

Cordelia Flores Jackson  
Director of Purchasing

Cordy;

Staff recommends the UISD benefits consulting contract be awarding to Ken Wethe of Wethe and Associates. Mr. Wethe has over 13 years experience working with UISD. The Employee Benefits Committee is very familiar and satisfied with Mr. Wethe's work. Additionally, Mr. Wethe provided the best pricing.

**UNITED INDEPENDENT SCHOOL DISTRICT  
EMPLOYEE INSURANCE BENEFITS CONSULTING SERVICES  
RFCQ CQ 020-2011**

VENDORS	Valley Risk Consulting, Inc	Wethe & Associates Inc	Wortham Insurance & Risk Management
<b>Option I:</b>			
<b>INSURANCE &amp; BENEFITS PLANS</b>	<b>Hourly Rate</b>	<b>Hourly Rate</b>	<b>Hourly Rate</b>
Health	\$165.00	\$125.00	\$250.00
District Paid Term Life	\$165.00	\$125.00	\$250.00
Supplemental Term Life	\$165.00	\$125.00	\$250.00
Dental	\$165.00	\$125.00	\$250.00
Vision	\$165.00	\$125.00	\$250.00
Disability	\$165.00	\$125.00	*\$250.00
Pre-Paid Legal	\$165.00	\$125.00	\$250.00
Student Extra-Curricular	\$165.00	\$125.00	\$250.00
Cafeteria Plan Administrators	\$165.00	\$125.00	\$250.00
<b>Option II:</b>			
	<b>Hourly Rate</b>	<b>Hourly Rate</b>	<b>Hourly Rate</b>
General Hourly Rate for other plans not listed	\$165.00	\$125.00	\$250.00
Notes	Hourly rate includes travel expense. Travel is at 10% to a max of \$2,400 a year. Amount of hours to be incurred is to be negotiated in advance of the project	Hourly rate includes travel & out of pocket costs max. hours for project to be determined prior to commencement of project	Hourly rate includes travel expense. *For disability only, company requested to be agent of record this option is disqualified under AG opinion. Firm has set hours in placed for each different project totaling 320 hours for all projects/plans.
Licenses	Risk Manager License Life & Health Ins. Counseling License	Risk Manager License Life & Health Ins. Counseling License General Lines - LAH & HMO including variable contracts General Lines - P & C Public Accountancy License for CPA	Risk Manager License Life & Health Ins. Counseling License General Lines - LAH & HMO General Lines - P & C
References	Weslaco ISD, McAllen ISD, & Donna ISD all good references	Laredo ISD, Webb County and Los Fresnos CISD	San Antonio ISD, Mission Consolidated, Corpus Christi ISD- good references

One vendor submitted a "No bid"