

**City of Mission**  
**Instructions to Respondent – Scope of Service**  
**RFQ Name/No.: Insurance Consulting Services / 26-xxx-xx-xx**

City of Mission is seeking Insurance Consulting Services

**1. Purpose of this Request of Qualifications**

The City is seeking sealed proposals of qualifications from experienced, independent insurance consulting firms or individuals interested in providing **Insurance Consulting Services**, serving as advisor to the City with respect to the Plan.

Through this Request for Qualifications (“RFQ”), the City seeks statements of qualifications from experienced, independent insurance consulting firms (each, a “Respondent”) interested in serving as the City’s insurance consultant and advisor with respect to the Plan. The selected consultant will provide professional, fiduciary-level advisory services, including but not limited to claims and financial analytics, stop-loss evaluation and placement support, plan design analysis, fiduciary governance support, and the procurement and ongoing management of the Plan’s third-party administrator (“TPA”), pharmacy benefit manager (“PBM”), and ancillary vendors. The City wishes to engage the consultant prior to issuing a Request for Proposals for TPA services so that the consultant can assist the City in scoping, drafting, and evaluating that subsequent procurement.

The City seeks to afford the opportunity for qualified SBE, MBE, and WBE firms to propose to provide the services described herein.

**1.1. About the City**

The City of Mission, Texas (the “City”) is a home-rule municipality located in Hidalgo County. The City employs approximately [ ] full-time employees and provides health and welfare benefits to its eligible employees, retirees, and their dependents through a self-funded employee health benefit plan (the “Plan”).

**1.2. Background on the Plan**

- Approximately [ ] covered employees and [ ] total covered lives;
- Annual paid medical and pharmacy claims of approximately \$[ ] for the most recent plan year;
- Specific stop-loss coverage at \$[ ] and aggregate stop-loss coverage at [ ]% of expected claims, currently placed with [ ];
- Current TPA: [ ]. Current PBM: [ ]. Current agent of record (“AOR”): [ ]. No insurance consultant of record at this time;
- Plan year: [Insert plan year, e.g., October 1 – September 30].

The figures above are provided for general informational purposes only. More detailed claims, enrollment, and financial data will be made available to short-listed Respondents subject to a mutually executed business associate agreement and confidentiality agreement consistent with the Health Insurance Portability and Accountability Act of 1996 (“HIPAA”).

**1.3. Definitions**

For purposes of this RFQ:

- “Agent of Record” or “AOR” means the licensed insurance agent or broker designated by the City to act as liaison between the City, the City’s employees, and the Plan’s insurance markets, including with respect to ancillary lines, employee enrollment, billing reconciliation, and day-to-day account servicing.
- “Consultant” means the firm selected pursuant to this RFQ to provide independent insurance consulting services to the City.