PROPOSAL NAME/NUMBER: 26-446-06-01 / Insurance Consulting Services

OPEN DATE: June 01, 2026 10:00 PM CST

Firm	Average Evaluation Score
Ortegon Insurance Agency	95.0
Newkirk & Newkirk, Inc.	67.0

PROPOSAL NAME/NUMBER: 26-446-06-01 / Insurance Consulting Services

OPEN DATE: June 01, 2026 2:00 PM CST

Evaluator	Evaluator #1		Evaluator #2		Evaluator #3			
Proposer	Rating	Points	Rating	Points	Rating	Points		Average
Ortegon Insurance Agency 505 S. Texas Blvd. Weslaco, TX 78596	Acceptable		Acceptable		Acceptable			
Sec. 1. Demonstrated experience advising self-funded governmental health plans, particularly Texas political subdivisions (25 Total Maximum Points)	Acceptable	25	Acceptable	23	Acceptable	24		
Sec. 2. Qualifications, depth, and continuity of the proposed engagement team (20 Total Maximum Points)	Acceptable	20	Acceptable	20	Acceptable	18		
Sec. 3. Proposed approach and methodology, including TPA RFP support and analytic capabilities (20 Maximum Points)	Acceptable	17	Acceptable	19	Acceptable	19		
Sec. 4. Independence and absence of conflicts of interest (15 Total Maximum Points)	Acceptable	15	Acceptable	15	Acceptable	15		
Sec. 5. Reasonableness of proposed compensation and overall value (15 Total Maximum Points)	Acceptable	13	Acceptable	15	Acceptable	13		
Sec. 6. References and demonstrated client satisfaction (05 Total Maximum Points)	Acceptable	5	Acceptable	5	Acceptable	5		
Final Determination of Review		95		97		94		95

Notes:

Strengths: (EV1) Experience working with self-funded groups, and with approximately six(6) municipalities.; *Provided organizational chart, listing team and experience. Over 40 years of combined experience.;* Approach and methodology acceptable. RFP creation and review(support of).; *No conflict of interest found.;* cost more in line with budget.; *Municipal references, # of references provided, Case studies of achieved plan success provided.;* **(EV2)** Well represented working with municipalities & ISD's. 8 current contracts. 40 years of experience.; *Licensed & Certified;* Approach Summary provided; *Independence provide/stated; Well sted references.* **(EV3)** Extensive public-sector experience; strong self-funded expertise; documented cost savings and renewal negotiations.; *Dedicated service team with experienced insurance and employee benefits professionals supported by an internal auditor. Experienced leadership team; dedicated servicing staff; clear assignment of responsibilities.;* Detailed methodology; strong reporting and analytical capabilities; comprehensive RFP support.; *Signed independence and compensation disclosures provided.;* Fixed annual consulting fee with optional additional services.; *Strong municipal, county, and ISD references; measurable results provided..*

Weaknesses: (EV1) Timeline needs to be edited to meet open enrollment period and schedule.; **(EV3)** *Smaller staffing depth than larger consulting firms; reliance on key personnel.;* Timeline may require acceleration to align with City open enrollment deadlines.; Competitive annual fee; broad scope included.;

Comments: (EV1) (EV2) Costs is always a driving factor. Total costs stated.; **(EV3)** Extensive experience advising Texas governmental entities on employee benefits, self-funded health plans, and insurance consulting services.; *Dedicated service team with experienced insurance and employee benefits professionals supported by an internal auditor.;* Comprehensive consulting approach including analytics, budgeting, compliance, procurement support, and ongoing plan management.; Additional costs for enrollment services, ACA reporting, and out-of-scope work.; *Extensive governmental references with documented client outcomes and savings.*

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Evaluator	Evaluator #1		Evaluator #2		Evaluator #3			
Proposer	Rating	Points	Rating	Points	Rating	Points		Average
Newkirk & Newkirk, Inc. 3101 N. Jackson Rd. McAllen, TX 78501	Acceptable		Acceptable		***Unacceptable***			
Sec. 1. Demonstrated experience advising self-funded governmental health plans, particularly Texas political subdivisions (25 Total Maximum Points)	Acceptable	20	Acceptable	23	***Not Acceptable***	5		
Sec. 2. Qualifications, depth, and continuity of the proposed engagement team (20 Total Maximum Points)	Acceptable	13	Acceptable	20	***Not Acceptable***	0		
Sec. 3. Proposed approach and methodology, including TPA RFP support and analytic capabilities (20 Maximum Points)	Acceptable	14	Acceptable	19	Acceptable	10		
Sec. 4. Independence and absence of conflicts of interest (15 Total Maximum Points)	Acceptable	15	Acceptable	15	Acceptable	15		
Sec. 5. Reasonableness of proposed compensation and overall value (15 Total Maximum Points)	***May be made Acceptable***	5	Acceptable	13	***May be Acceptable***	5		
Sec. 6. References and demonstrated client satisfaction (05 Total Maximum Points)	Acceptable	3	Acceptable	4	***Not Acceptable***	2		
Final Determination of Review		70		94		37		67

Notes:

Strengths: (EV1) Experience working with self-funded groups.; *Experienced with Employee Benefits, RFP's, etc.;* Support of RFP creation and review.; *No conflict of interest found.; Listed 3 required references.* **(EV2)** Qualifications & Expertise well stated.; *Qualifications & Expertise well stated.;* Strategy/Approach stated; *Independence & Conflicts of Interest documented.;* **(EV3)** *Independence and compensation disclosures provided.;*

Weaknesses: (EV1) No municipalities listed as clients/references.; *Did not list complete serviceng team and experience., Proposal not as in depth with information on N&N.;* No timeline with projected dates.; Cost prohibited; *No municipal references/client satisfaction.* **(EV2) (EV3)** No demonstrated self-funded governmental experience; no municipal experience disclosed.; *Insufficient information to evaluate qualifications, staffing depth, or continuity.;* Limited detail regarding analytics, claims reviews, benchmarking, and self-funded plan consulting. Methodology does not show detail or fluidity.; Compensation significantly higher than competing proposal with less supporting detail and scope.; *Limited references; no municipal references.*

Comments: (EV1) If compensation is negotiated. Cost is not feasible. **(EV2)** Costs is Always a major factor. Costs well stated.; *References provided.* **(EV3)** Limited information provided regarding governmental self-funded health plan experience.; Proposal does not provide staffing qualifications, resumes, or organizational information., Proposal outlines a consulting process covering enrollment, compliance, negotiations, and administration.; May be acceptable if compensation is negotiated. Not economical as it stands., Fee based on $9 per employee per month.; *Four references provided, including one water district and one educational institution.*