

PROPOSAL NAME/NUMBER: 24-339-04-03 / Agent of Record



OPEN DATE: April 03, 2024 2:00 PM CST

Evaluator		
Noemi Munguia / Nereyda Peña / Robert Hinojosa	Andy Garcia	David Flores

Proposer	Rating	Score	Rating	Score	Rating	Score	Average	Notes:
Ortegon Insurance Agency	Acceptable		Acceptable		Acceptable			<p>Strengths: (NMNPRH) Billing reconciliation, provide auditor; on-site billing clinic 28 employees, 5 dedicated to COM, 1 dedicated auditor, municipal experience; no interruption of service; 6.5% commission. (AG) Billing Reconciliation, Auditor included, onsite wellness clinic 28 employees, 5 dedicated to city, and 1 auditor, municipal experience; 6.5% commission (DF) employee range of current clients match Mission, Billing reconciliation, Employee Navigator/electronic provides internal auditor wellness clinic onsite, employee range of current clients in line with Mission, 6 dedicated employees(includes auditor) 35 years straight municipal experience local; Continuity of Service; 6.5% of all benefits as noted in question #31</p> <p>Weaknesses: (NMNPRH) only employee navigator, no Selerix; outdated timeline (AG)No Selires; outdated timeline (2023); (DF) no access to Selerix, years mentioned in the answer #29 shows 2023, should be 2024,</p> <p>Comments: (AG) Edinburg, Donna, San Juan, Mercedes School Districts (DF) Edinburg, San Juan, months and days are good,</p>
Sec. A. Scope of Service: (40 points max)	Acceptable	38	Acceptable	37	Acceptable	38		
Sec. B. Qualifications and Experience : (25 Points max)	Acceptable	23	Acceptable	21	Acceptable	23		
Sec. C. Service and Methodology (10 Points max)	Acceptable	6	Acceptable	7	Acceptable	5		
Sec. D. Commission (25 Points max)	Acceptable	25	Acceptable	24	Acceptable	20		
Total Score		92		89		86	89.00	
The Infinitus Group	Acceptable		Acceptable		Acceptable			<p>Strengths: (NMNPRH) Access to Employee Navigator and Selerix, Reconcile Billing, no interruption; local office, 13 yrs. experience, 12 employees, some municipal experience, disaster recovery plan and quality assurance plan; work implementation time frame; 9% commission; (AG) Employee Navigator and Selerix, local office, 13 years of experience(limited relative to others) 12 employees, municipal experience, 9% commission (DF) access to employee navigator or Selerix; local office, 13 years, 12 employees; good timeline, no disruption of services; 9% commission rate</p> <p>Weaknesses: (NMNPRH) (AG) (DF)</p> <p>Comments: (NMNPRH) would want to confirm that they have billing, conduct reconciliation (AG) Mission and Raymondville, (DF) do they conduct reconciliation at or near 100%?, current City of Mission, City of Raymondville;</p>
Sec. A. Scope of Service: (40 points max)	Acceptable	35	Acceptable	37	Acceptable	35		
Sec. B. Qualifications and Experience : (25 Points max)	Acceptable	20	Acceptable	19	Acceptable	20		
Sec. C. Service and Methodology (10 Points max)	Acceptable	8	Acceptable	8	Acceptable	10		
Sec. D. Commission (25 Points max)	Acceptable	20	Acceptable	21	Acceptable	20		
Total Score		83		85		85	84.33	

PROPOSAL NAME/NUMBER: 24-339-04-03 / Agent of Record



OPEN DATE: April 03, 2024 2:00 PM CST

Evaluator		
Noemi Munguia / Nereyda Peña / Robert Hinojosa	Andy Garcia	David Flores

Proposer	Rating		Score		Rating		Score		Average	Notes:
Lone Star Insurance Services	Acceptable		Acceptable		Acceptable				83.67	<p>Strengths: (NMNPRH) Billing Reconciliation, Employee Navigator & Selerix, New Hire Orientation & Open Enrollment, Outstanding Service; 25 yrs. experience, 18 licensed professionals, 40 licensed enrollers, good municipal experience, very good overall; work implementation plan; continuity of service 10% employer paid products commission (AG) billing recon, knowledgeable in city operations, Employee Navigator and Selerix; 25 years experience, 18 license professionals, 14 enrollers licensed, knowledge on municipal work, City of Mission experience (DF) reconciliation 100%, employee navigator and Selerix, 25 yrs., 18 licensed professionals, good municipal experience, 40 enrollers; detail explanation of commission, able to take customer calls from HR,</p> <p>Weaknesses: (NMNPRH) no quality assurance plan; no time frame, 20% voluntary products commission (AG) no Quality Assurance Plan; time frame in plan but with no dates; 20% volunteer products(heavy) (DF) no quality assurance plan, no timeline provided</p> <p>Comments: (AG) current AOR for City of Mission; City of Pharr, San Benito Clients (municipal) current AOR for COM; 10% employer paid commission is average with other bidders (DF) current AOR, done everything we have asked, Pharr, San Benito, Roma, implementation plan, 10% for employer paid products, VOL and Disability at 20%</p>
Sec. A. Scope of Service: (40 points max)	Acceptable	40	Acceptable	38	Acceptable	39				
Sec. B. Qualifications and Experience : (25 Points max)	Acceptable	23	Acceptable	22	Acceptable	20				
Sec. C. Service and Methodology (10 Points max)	Acceptable	7	Acceptable	7	Acceptable	6				
Sec. D. Commission (25 Points max)	Acceptable	16	Acceptable	15	Acceptable	18				
Total Score	86		82		83					
Salazar Insurance Group	Acceptable		Acceptable		Acceptable				81.00	<p>Strengths: (NMNPRH) Billing reconciliation, assist with 1094, ACA reporting, Employee Navigator; Strong Municipal experience, 20+ yrs. experience, 20 employees, 30 agents; continuity of service, anticipate projected cost; 10% CAP; (AG) billing recon confirmed with ACH payment, big plus, employee navigator; 20 years experience, municipal experience 20 employees 30 agents; 10% Cap all products (DF) Billing recon, assist with reporting (ACA) take workload from HR; municipal experience, 20+, 70+ employees, continuity of service;</p> <p>Weaknesses: (NMNPRH) No Selerix option; no disaster recovery plan; no quality assurance program; no formal implementation plan, no detail time frame; (AG) no Selerix; no disaster recovery, Q A Plan; no formal implementation plan or detailed time frame; (DF) no Selerix; no disaster recovery, no quality assurance plan, no formal implementation plan,</p> <p>Comments: (AG) clients, McAllen, Weslaco Brownsville and Edinburg. (DF) overall good, 10%</p>
Sec. A. Scope of Service: (40 points max)	Acceptable	37	Acceptable	36	Acceptable	35				
Sec. B. Qualifications and Experience : (25 Points max)	Acceptable	22	Acceptable	22	Acceptable	20				
Sec. C. Service and Methodology (10 Points max)	Acceptable	5	Acceptable	4	Acceptable	5				
Sec. D. Commission (25 Points max)	Acceptable	18	Acceptable	20	Acceptable	19				
Total Score	82		82		79					



OPEN DATE: April 03, 2024 2:00 PM CST

Evaluator		
Noemi Munguia / Nereyda Peña / Robert Hinojosa	Andy Garcia	David Flores

Proposer	Rating	Score	Rating	Score	Rating	Score	Average	Notes:
GEF Financial Group	Acceptable		Acceptable		Acceptable			
Sec. A. Scope of Service: (40 points max)	Acceptable	34	Acceptable	34	Acceptable	30		<p>Strengths: (NMNPRH) billing reconciliation, Employee Navigator and Selerix; 16 yrs. experience, <i>time frame is good; continuity of service; 9% Commission (AG) Employee Navigator and Selerix; 16 years if service; 9% all products; (DF) billing reconciliation/outsourced, assist in open enrollment, new hire orientation(limited); 11-16 years have municipal experience; timeline good and continuity of service; 9% commission net, Cap</i></p> <p>Weaknesses: (NMNPRH) new hire orientation limited; no disaster recovery plan, no quality assurance, limited staff 8; limited municipal experience; no quality assurance plan (AG) new hire orientation limited; <i>no disaster plan, no quality assurance plan, limited staff; no implementation plan (DF) does not have disaster recovery plan, does not have a quality assurance plan, limited local government experience, implementation plan,</i></p> <p>Comments: (DF) depending on carrier, Employee Navigator or Selerix, 6-8 employees total,</p>
Sec. B. Qualifications and Experience : (25 Points max)	Acceptable	18	Acceptable	18	Acceptable	18		
Sec. C. Service and Methodology (10 Points max)	Acceptable	8	Acceptable	5	Acceptable	5		
Sec. D. Commission (25 Points max)	Acceptable	20	Acceptable	21	Acceptable	18		
Total Score		80		78		71	76.33	
SWBC Life Insurance Agency	Acceptable		Acceptable		Acceptable			
Sec. A. Scope of Service: (40 points max)	Acceptable	20	Acceptable	18	Acceptable	25		<p>Strengths: (NMNPRH) <i>Employee Navigator; 48 yrs. of experience; 7 dedicated employees, 2950 total employees, disaster recovery plan; good time frame, continuity of service, good work implementation plan 10% commission, 0% EAP; (AG) 48 years, 7 employees dedicated to COM, 2900 employees, disaster recovery; good time frame, continuity of service; 10% commission on all products; (DF) 7 dedicated employees to the City, 48 yrs. experience, Employee Navigator, has plan for Implementation, has disaster plan, 31 years, 7/2900 dedicated employees; good implementation plan, timeframe;</i></p> <p>Weaknesses: (NMNPRH) did not specify billing reconciliation(as needed), no Selerix; <i>not local, no quality assurance, limited municipal experience; minor disruption of service. (AG) no Selerix; billing recon as needed; no quality assurance; minor disruption of services; (DF) main office out of SA, no Selerix, no Quality Assurance Program,</i></p> <p>Comments: (AG) municipalities in San Antonio Area, mostly county and ISD's limited municipal; (DF) billing reconciliation is needed; 10% across most of the products</p>
Sec. B. Qualifications and Experience : (25 Points max)	Acceptable	15	Acceptable	20	Acceptable	20		
Sec. C. Service and Methodology (10 Points max)	Acceptable	9	Acceptable	9	Acceptable	10		
Sec. D. Commission (25 Points max)	Acceptable	18	Acceptable	20	Acceptable	18		
Total Score		62		67		73	67.33	
Higginbotham Public Sector	Potentially Acceptable		Potentially Acceptable		Acceptable			
Sec. A. Scope of Service: (40 points max)	Acceptable	35	Acceptable	38	Acceptable	35		<p>Strengths: (NMNPRH) Mobile App, local Rep, Employee Navigator & Selerix, Billing Reconciliation, RFP process 20 yrs. experience, <i>municipal experience, 99 employees; time frame; (AG) mobile app; local rep, employee navigator and Selerix, billing recon, RFP assistance; municipal experience, 20 yrs. experience, 99 employees, 1 local rep (DF) mobile app, employee navigator or Selerix, billing reconciliation, RFP process; 99 employees, local rep, 20 years experience, municipal experience, good time frames; no additional cost to the city</i></p> <p>Weaknesses: (NMNPRH) Retention Rate; <i>only 1 local rep; no commission listed, standard industry commission (AG) 1 local rep; no commission listed (industry standard) (DF) 3 years in business;</i></p> <p>Comments: (AG) . (DF) located in Richardson, TX; <i>standard commission rate (vague)</i></p>
Sec. B. Qualifications and Experience : (25 Points max)	Acceptable	20	Acceptable	19	Acceptable	20		
Sec. C. Service and Methodology (10 Points max)	Acceptable	10	Acceptable	9	Acceptable	10		
Sec. D. Commission (25 Points max)	Not Acceptable	0	Not Acceptable	0	Acceptable	5		
Total Score		65		66		70	67.00	

PROPOSAL NAME/NUMBER: 24-339-04-03 / Agent of Record



OPEN DATE: April 03, 2024 2:00 PM CST

Evaluator		
Noemi Munguia / Nereyda Peña / Robert Hinojosa	Andy Garcia	David Flores

Proposer	Rating		Score		Rating		Score		Average	Notes:
RJGRS	Acceptable		Acceptable		Potentially Acceptable					<p>Strengths: (NMNPRH) good solicitation plans; 24 yrs. experience, 15 employees, disaster recovery plan, quality assurance plan, local, <i>provided work implementation, no disruption of service</i>; (AG) 24 years of experience, 15 employees, local, disaster recovery and quality assurance, (DF) solicitation well; 24 years in business</p> <p>Weaknesses: (NMNPRH) billing reconciliation, only reports listed, does not specify platform; <i>limited municipal, 1 city (city of Edinburg)</i>; no detailed timeline; 20% commission, <i>although negotiable</i> (AG) No billing recon, no commitment clear, limited municipal, no detail timeframe, 20% commission across the board (DF) not much content; <i>no detail timeline</i>;</p> <p>Comments: (NMNPRH) would want to confirm that they have billing, conduct reconciliation (AG) AOR for City of Edinburg, limited municipal work, <i>commission negotiable</i> (DF) not clear if the firm will do the reconciliation; 15 employees, 1 city (Edinburg) 3 ISD's; <i>general work/implementation plan, no disruption of service</i>; flat 20% negotiable</p>
Sec. A. Scope of Service: (40 points max)	Acceptable	20	Acceptable	20	May be Acceptable	20				
Sec. B. Qualifications and Experience : (25 Points max)	Acceptable	18	Acceptable	20	Acceptable	18				
Sec. C. Service and Methodology (10 Points max)	Acceptable	7	Acceptable	6	Acceptable	6				
Sec. D. Commission (25 Points max)	Acceptable	13	Acceptable	7	May be Acceptable	15				
Total Score	58		53		59		56.67			
Bob Trevino Insurance/ Workplace Benefit Advisors	Potentially Acceptable		Potentially Acceptable		Potentially Acceptable					<p>Strengths: (NMNPRH) Platforms available, Employee Navigator and Selerix; 38 yrs. of experience, local, Pharr, TX (AG) Employee Navigator and Selerix; 34 years of experience local (DF) ISD experience, or Selerix open enrollment programs, local, Pharr, 38 yrs.,</p> <p>Weaknesses: (NMNPRH) Limited notes; <i>No municipal experience, limited staffing, no disaster recovery, no quality assurance. did not elaborate on responses, no commission listed</i> (AG) limited notes(not much detail); <i>no municipal experience, limited staffing, no disaster recovery or quality assurance plan</i>; limited elaboration on responses; no response on cap commission rate (DF) no municipal experience listed, <i>no disaster recovery plan, no quality assurance plan</i>; limited notes on questions;</p> <p>Comments: (AG) . (DF) 8 employees; <i>no commission information given</i></p>
Sec. A. Scope of Service: (40 points max)	Acceptable	35	Acceptable	34	Acceptable	30				
Sec. B. Qualifications and Experience : (25 Points max)	Acceptable	12	Acceptable	12	May be Acceptable	12				
Sec. C. Service and Methodology (10 Points max)	Acceptable	8	Acceptable	4	Acceptable	5				
Sec. D. Commission (25 Points max)	Not Acceptable	0	Not Acceptable	0	May be Acceptable	5				
Total Score	55		50		52		52.33			

PROPOSAL NAME/NUMBER: 24-339-04-03 / Agent of Record



OPEN DATE: April 03, 2024 2:00 PM CST

Evaluator		
Noemi Munguia / Nereyda Peña / Robert Hinojosa	Andy Garcia	David Flores

Proposer	Rating		Score		Rating		Score		Average	Notes:
	Potentially Acceptable	Unacceptable	Potentially Acceptable	Unacceptable	Potentially Acceptable	Unacceptable				
Newkirk & Newkirk Inc.	Potentially Acceptable	Potentially Acceptable	Potentially Acceptable	Unacceptable	Potentially Acceptable	Unacceptable	Potentially Acceptable	Unacceptable	47.00	<p>Strengths: (NMNPRH) 13 employees; all billing covered; 32 yrs. of experience, local office; no interruption of service expected; (AG) 32 years experience, local office; (DF) Employee Navigator, local</p> <p>Weaknesses: (NMNPRH) no timeline, only listed Employee Navigator; only 1 city (Alamo), limited municipal experience; did not provide timeframe with Open Enrollment; did not provide commission; (AG) no timeline no Selerix; limited municipal experience, no timeframe for open enrollment; (DF) City of Alamo, smaller city, limited Municipal experience; no timeline for enrollment; Commission cap not explained</p> <p>Comments: (AG) City of Alamo(smaller city) Open enrollment timeline? No commission listed (DF) Simple packet with not much info; listed previous clients; not much methodology explained,</p>
	Acceptable	30	Acceptable	34	Not Acceptable	15	Acceptable	15		
Sec. A. Scope of Service: (40 points max)	Acceptable	30	Acceptable	34	Not Acceptable	15	Acceptable	15		
Sec. B. Qualifications and Experience : (25 Points max)	Acceptable	15	Acceptable	19	Not Acceptable	10	Acceptable	10		
Sec. C. Service and Methodology (10 Points max)	Acceptable	7	May be Acceptable	6	Not Acceptable	5	Acceptable	5		
Sec. D. Commission (25 Points max)	Not Acceptable	0	Not Acceptable	0	Not Acceptable	0	Acceptable	0		
Total Score		52		59		30			47.00	
South Texas Risk Management	Potentially Acceptable	Unacceptable	Unacceptable	Unacceptable	Potentially Acceptable	Unacceptable	Potentially Acceptable	Unacceptable	26.67	<p>Strengths: (NMNPRH) Local, 14 employees (AG) local, 14 employees, municipalities; (DF) employee navigator as application; local;</p> <p>Weaknesses: (NMNPRH) Open Enrollment 3 months, no detail for billing, Enrollment platform, Employer Navigator, and EASE system; 4 yrs. experience, 3 cities, all small, misspellings, no disaster recovery plan, no quality assurance; 3 months to complete open enrollment; no commission listed (AG) Open Enrollment-3 months, no detail on billing, no Selerix; 4 years experience (low), misspellings, no disaster recovery or Quality Assurance Plan, 3 months for open enrollment (timeline not acceptable), no commission listed (DF) no disaster recovery plan, no quality assurance plan, 13 employees, young firm (4 years); 3 months to implement too long,</p> <p>Comments: (NMNPRH) no commission provided, needed a firm number; (AG) Palmview, San Juan Port Isabel; (DF) work experience with smaller jurisdictions, standard commission rate [vague]</p>
	Acceptable	20	Acceptable	10	Not Acceptable	10	Acceptable	10		
Sec. A. Scope of Service: (40 points max)	Acceptable	20	Acceptable	10	Not Acceptable	10	Acceptable	10		
Sec. B. Qualifications and Experience : (25 Points max)	Acceptable	10	Acceptable	11	Not Acceptable	10	Acceptable	10		
Sec. C. Service and Methodology (10 Points max)	Not Acceptable	5	Not Acceptable	0	Not Acceptable	4	Acceptable	4		
Sec. D. Commission (25 Points max)	Not Acceptable	0	Not Acceptable	0	Not Acceptable	0	Acceptable	0		
Total Score		35		21		24			26.67	