

PHARR - SAN JUAN - ALAMO I.S.D.
REQUEST FOR QUALIFICATIONS (RFQ'S) FOR INSURANCE CONSULTANT SERVICES # 19-20-031
RFQ OPENING: OCTOBER 28, 2019 @ 2:30 P.M.

Event Number # 19-20-031
Event Title Request for Qualifications (RFQ'S) for Insurance Consultant Services
Event Description
Event Type RFQ
Issue Date 9/27/2019 04:15:03 PM (CT)
Close Date 10/28/2019 02:30:00 PM (CT)

Organization PSJA ISD Ebids
Workgroup Purchasing
Event Owner Emily Garza
Email emily.garza@psjaisd.us
Phone
Fax

Recommendation: That the Board of Education award the Request for Qualifications (RFQ's) for Insurance Consultant Services # 19-20-031 to the lowest proposer listed below:

Awarded Suppliers

Responding Supplier	City	State	Response Submitted	Lines Responded	Response Total
Gallagher (Gallagher Benefit Service, Inc.)	San Antonio	TX	10/28/2019 10:18:34 AM (CT)	0	\$60,000.00

 Emily Garza, Director of Purchasing

 Janet Robles, Chief Financial Officer

Charge Budgeted Account Numbers:

Seventy Four (74) invitations were emailed to vendors
 Eighteen (18) Vendors viewed Bid Specifications
 Nine (9) Submitted Bid
 One (1) Unsubmitted Bid
 Three (3) No Bid

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Att #	Attribute Name	Acrisure LLC dba Carlisle Insurance	Gallagher (Gallagher Benefit Service, Inc.)
59	Will the bid/proposal deviate from specifications?	No	No
60	If yes, please specify: (Form B - Deviations from Specifications of General Terms Conditions Compliance Signature Form, MUST BE COMPLETED.)	No Deiations.	NA
61	Business/Company Owner Name Please provide complete name of the business/company owner responding to the bid/proposal.	Acrisure LLC DBA Carlisle Insurance	Publicly Traded
62	Date of Establishment	1925	1927
63 GENERAL INFORMATION			
64	Full name of firm	Acrisure LLC DBA Carlisle Insurance	Arthur J Gallagher & Co
65	Names of all partners, shareholders and associates of firm.	Acrisure LLC is a privetely held corporation with over 1,000 shareholders across the world.	Publicly Traded
66	Address, phone and fax numbers of firm's principal office.	500 N. Water Street, Suite 900, Corpus Christi, Texas 78401	1900 West Loop South Houston TX 77027, 281-773-8954
67	Contact information for the person and office that will be providing the consulting services to the District (if different than that of the firm's principal office).	Zach Gingrich	Nick Long 281-773-8954 nick_long@ajg.com
68	Select type of ownership of firm:	corporation	corporation
69	History of the firm, including dates of predecessor firms (if any) and establishment of present firm.	Carlisle Insurance was found in 1925	1927
70	Minority status of the firm	Not Applicable	Not Applicable
71	Indicate the percentage of minority employees.	0%	45%
72 STATEMENT OF QUALIFICATIONS			
73	Agencies interested shall submit their detailed qualifications which should include their experience, qualifications of personnel that would be assigned to the District's account and resources they can make available to the District.	Please see attachment number one for experience and personnel experience.	<p>Your Gallagher team combines experience in developing and delivering innovative benefits strategies, compelling employee communications, time-saving administrative support and knowledgeable compliance and legislative services. Using Gallagher's benefits delivery process, we make sure every facet of your program aligns with your employee benefits strategy. With Gallagher as your partner, you can be certain that your needs will be fully served now and well into the future. Your Gallagher team will be your local resource that puts the strength of our entire 2,500-person global benefits team to work for PSJA employee benefits program. Areas of expertise include: •Industry experience •Experience with all types of benefit programs •Strategic planning & consulting •Carrier underwriting & negotiation •Relationship management and executive presentations •Employee communication programs for Public Sector •Compliance and regulatory support •HR department systems and processes •Market research and statistical reporting •3rd party admin and ancillary services •Wellness & disease management programs The Texas based customer service unit will manage all aspects of PSJA's program and will be your daily contacts whenever you need help. They are experts in administering benefit plans, including employee communications, analysis and reporting, carrier negotiations and problem solving. Complementing your local Gallagher team are our corporate and regional industry experts who provide specialized client support. They monitor and communicate on legislative and compliance issues, provide actuarial support and analysis, and audit plan performance, systems and tools. Their integrated efforts help you manage your benefit plans and costs based on the latest trends, research and carrier information. Together, these Gallagher professionals will provide PSJA an unsurpassed client experience and the most competitive employee benefits plan possible. One of our key competitive strengths is the ability to provide clients with an in-depth analysis of benefit-related issues. A robust real time reporting and benchmarking package will be available to PSJA. This package will provide complete transparency to the benefits package. When it comes to representing PSJA to carriers, Gallagher has the experience, the relationships and the independence you need. We know the markets and we know their specific strengths. As a result, we can objectively evaluate carriers that offer the right products for your individual needs. Gallagher maintains complete independence to remain objective in providing the most qualified carriers, vendors, networks and risk arrangements for each unique negotiation. We'll manage every detail of the marketing process, including: •Strategic development to identify goals, analyze program costs, and review current and recommended funding arrangements •Management of the renewal with the current carrier geared to achieving lower costs •Recommendation on exploring alternatives to your current carrier •Renewal timeline that covers every aspect from RFP preparation to the delivery of employee communications •RFP development that involves tailoring the RFP to the exact desires, needs, and financial directions provided by PSJA •Exploration of funding alternatives •Evaluation of vendor responses to identify variations in coverage and cost •Conduct finalist interviews to explore intangibles, such as personalities, service orientation and responsiveness •Renewal analysis report, covering program, and claims cost projections as well as complete information on benefit designs •Finalize decisions involving close collaboration with the Gallagher team and PSJA HR management and executives Our experienced customer service team is available toll-free each business day from 8 am to 6 p.m. CST to answer questions from your employees and administrators about benefits, claims issues, provider issues, compliance and general HR matters. Service is av</p>

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Att #	Attribute Name	Acrisure LLC dba Carlisle Insurance	Gallagher (Gallagher Benefit Service, Inc.)
74	EXPERIENCE AND REFERENCES		
75	Consulting services experience with school districts in the past 5 years.	Mission CISD, City of Edinburg, San Benito CISD, City of Alice, City of Kingsville, City of Port Aransas	Gallagher currently works with more Texas Self Funded Districts than all of our competitors combined. We are the awarded consultant of the TASB Benefit Coop and currently work with the following Texas ISDs: •Aldine ISD •Alief ISD •Austin ISD •Channelview ISD •Corpus Christi ISD •Donna ISD •Flour Bluff ISD •Fort Bend ISD •Harlingen ISD •Houston ISD •Katy ISD •Kingsville ISD •Lake Travis ISD •Lamar CISD •Lyford ISD •McLean ISD •Mercedes ISD •Monte Alto ISD •Pasadena ISD •Pleasanton ISD •San Antonio ISD •San Benito CISD •Santa Fe ISD •Schertz Cibolo Universal City ISD •Socorro ISD •South San Antonio •Stanton ISD •Waco ISD •Ysleta ISD
76	Recent work experience with the District.	Carlisle Insurance is currently the servicing agent for coverages associated with the property and casualty. Carlisle Insurance is not associated with any health insurance coverages or requested scope of work associated with this RFQ.	Gallagher has never worked with PSJA
77	List the names, addresses and contract information of five references. References should be comparable sized District to Pharr-San Juan-Alamo ISD, if possible.	(1) Mission CISD - 1201 Bryce Drive, Mission TX 78572 (2) San Benito CISD - 240 N. Crockett St, San Benito TX 78586 (3) City of Edinburg - 415 W University Dr., Edinburg TX 78541 (4) City of Alice - 500 E. Main Street, Alice TX 78332 (5) City of Kingsville - 200 E. Kleberg Ave., Kingsville TX 78363	Katy ISD Lance Nauman Risk Manager Nauman 281.396.6000 LanceNNauman@KATYISD.ORG, Houston ISD Denise Crandon Sr. Manager (469) 441-0511 Denise.Crandon@houstonisd.org, Austin ISD Lynn Brennan Dir. Of Benefits (512) 414-2129 lynn.brennan@austinisd.org, Fort Bend ISD Sonja Curtis Dir. Of Benefits (281) 634-1219 Sonja.Curtis@fortbendisd.com, Mercedes ISD Ralph Mendez Director (956) 514-2011 ralph.mendez@misdtx.net
78	CURRENT ASSIGNMENTS		
79	Provide a statement concerning the consultant's ability and capacity to perform the work in relation to existing assignments. List the consultant's current workload and the availability to commence services immediately after being selected by the District	Please see attachment number one for experience and personnel experience. The team assigned to Pharr-San Juan-Alamo ISD will have the appropriate workload to ensure timely responses and availability to meet.	The Gallagher public sector team takes great pride in providing exceptional service thus each Account Executive and Consultant may only take on 5 active engagements at a time. The team assigned to PSJA currently have only 3 active engagements and have adequate bandwidth to immediately take on a project of PSJA's size and scope
80	SERVICES		
81	Provide a summary of services proposed to be provided by your firm. Do not list services provided through collaboration with outside firms.	We agree to the Scope of Services advertised with this RFQ. We are capable with the experience needed to perform these services.	Gallagher can perform all services as described in the RFP. Additional we are offering some additional services at no additional cost that are fully detailed in the proposal. These services include unlimited compliance consulting, Rx consulting, wellness consulting, basic actuarial services, data warehouse and bench marking, enrollment system, open enrollment services, and access to the Texas Education Collective.
82	If applicable, please include a sample agreement normally used by the firm, when providing these types of services. (Sample agreement may be uploaded on the Response Attachments tab.)		
83	AVAILABILITY		
84	Outline the procedures and timelines by which district staff will have access to consultant services.	Carlisle Insurance will be available immediately with no limitations to our availability or visits.	Gallagher will be available the day following the award of the contract
85	EQUAL OPPORTUNITY		
86	Provide a statement that the firm will not discriminate against any employee or applicant for employment because of age, disabilities, race religion, sex, color, or national origin.	Carlisle Insurance will not discriminate against any employee or applicant for employment because of age, disability, race religion, sex, color or national origin.	Gallagher will not discriminate against any employee or applicant for employment because of age, disabilities, race religion, sex, color, or national origin.
87	SCOPE OF WORK The successful respondent will perform the following core services as part of the total employee benefits consulting services and any other coverage the District deems appropriate		
88	Review and develop a Request for Proposal to provide health insurance coverage by contracting with health insurance companies and or with third party administrators.	Yes	Yes
89	Itemize the costs associated with a Request for Proposal development; review the self-funded proposals, assessing for the District the most favorable proposals that offer the least amount of financial risk.	Yes	Yes
90	Analyze and evaluate the proposals submitted and prepare a written report of findings and recommendations, conducting bidders' conferences as appropriate and respond to bidders' questions.	Yes	Yes

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91	Review and coordinate vendor finalist presentations and assist in the development of plan recommendations.	Yes	Yes
92	EMPLOYEE BENEFIT CONSULTING AND MONITORING		
93	Ensure accurate follow through on all negotiated contractual self-funded arrangements made between PSJA ISD and any insurance carriers utilized by the District are strictly adhered to.	Yes	Yes
94	Provide current information on managed care delivery systems, including PPO and POS, and other current and emerging systems and any other general health care consulting advice.	Yes	Yes
95	Perform a rate analysis, evaluate and negotiate all renewals of each fiscal year.	Yes	Yes
96	Monitor administrators actuarial and renewal assumptions under the self-insured program.	Yes	Yes
97	Monitor all contracts and maximize management information available through all providers.	Yes	Yes
98	Intervene and resolve claim issues related to all self-insured plans when needed or requested.	Yes	Yes
99	Monitor claim performance according to any performance standards contracts the District may have with any provider. Recommend the establishment of additional performance standard agreement with vendors if there are service problems.	Yes	Yes
100	Monitor and coordinate self-insurance financial plans, including claim processing, excess insurance(s), banking arrangements, booklets, identification cards, plan documents and administrative/premium payments.	Yes	Yes
101	Assist and provide recommendations in order to fulfill compliance requirements of State and Federal regulations, statutes and mandates. (COBRA, HIPAA, ACA, etc.)	Yes	Yes
102	Assist with development of employee benefits statements, if requested.	Yes	Yes
103	Provide routine group benefit and general health care consulting advice. Assist the District in establishing a strategic plan for employee benefits. Provide ongoing analysis and planning of new approaches to employee benefits. Take the initiative to bring new ideas to the District working with the district-wide Insurance Committee to develop and provide policy direction.	Yes	Yes
104	Provide ongoing analysis of plan design, cost containment strategies and cost sharing alternatives available to the district while maintaining integrity of current contracts.	Yes	Yes
105	Provide information or testimony and or other litigation hearings pertaining to benefit issues.	Yes	Yes
106	Develop strategies for implementation of new benefit programs by, assisting with employee communications and meetings as new programs are implemented and about existing benefits and how to use them properly.	Yes	Yes
107	Inform the District of changing legislation and legal decisions affecting employee benefits. Advise and discuss methods to comply with these changes.	Yes	Yes
108	Assist District with implementation of new wellness programs, provide assistance, materials and resources for wellness program, employee education materials for healthy lifestyles and participation in health fairs.	Yes	Yes
109	Provide advice on data practices, records retention and privacy issues.	Yes	Yes
110	Prepare a servicing team available to District to be available at open enrollment meetings to explain the plans, amendments, issues and trends to employees enrolling in the benefit plans.	Yes	Yes
111	Attend the quarterly Insurance Committee Meetings.	Yes	Yes
112	Conduct workshops and or prepare reports for the Board of Trustees covering health insurance issues, cost trends, plan design options, utilization trends, and rating structures, and the advantages/disadvantages associated with various funding alternatives	Yes	Yes
113	All data and information developed or acquired remain the property of the District at the end of the contract, to include spreadsheets, reports and data bases.	Yes	Yes

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Att #	Attribute Name	Acrisure LLC dba Carlisle Insurance	Gallagher (Gallagher Benefit Service, Inc.)
114	EVALUATION CRITERIA & SELECTION PROCESS	acknowledge	acknowledge

Evaluation Criteria shall be based off the following criteria:

- Qualification/Experience - 30%
- Experience with Same Size District - 20%
- Technical Competence - 20%
- Staffing Capabilities - 20%
- Meeting the current and future needs of the District - 10%

The Pharr - San Juan - Alamo ISD will follow the process below:

- First, the district will set up interviews.
- Second, the district will negotiate with the selected provider a contract at a fair and reasonable price.
- If a satisfactory contract cannot be negotiated with the most highly qualified provider, the district shall formally end negotiations and select the next most highly qualified provider.
- The Pharr - San Juan - Alamo ISD will continue the above process until a qualified provider is selected.
- The Pharr - San Juan - Alamo ISD will present to the Board for approval.
- The PSJA ISD Board of Trustees reserves the following rights, but not limited to:
 - Starting date to be negotiated
 - To terminate contract by giving a thirty (30) day written notice
 - To pay for services on a monthly basis
 - To reject any and all negotiated proposals
 - To waive any technicalities and informalities
 - To negotiate the terms of the proposal

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Att #	Attribute Name	Higginbotham (Higginbotham Insurance Agency, Inc.)	Hotchkiss Insurance Agency
59	Will the bid/proposal deviate from specifications?	No	No
60	If yes, please specify: (Form B - Deviations from Specifications of General Terms Conditions Compliance Signature Form, MUST BE COMPLETED.)	N/A	N/A
61	Business/Company Owner Name Please provide complete name of the business/company owner responding to the bid/proposal.	Higginbotham Insurance Agency; William Thomas Taylor, III and Michael Gerard Avenevoli	Mike Hotchkiss, Douglas Hotchkiss, Ken Hotchkiss and Greg Hotchkiss
62	Date of Establishment	1948	1975
63 GENERAL INFORMATION			
64	Full name of firm	Higginbotham Insurance Agency, Inc	Hotchkiss Insurance Agency, LLC.
65	Names of all partners, shareholders and associates of firm.	Higginbotham is privately held with 645 beneficial stockholders, 490 of which are employees.	Mike Hotchkiss, Douglas Hotchkiss, Ken Hotchkiss, Greg Hotchkiss, Brad Burnham, Wes Weatherred, Farrah Carlton, Wayne Bishop, Ross Conner, Tye Justice, Hunter Rmseyand Gary Lindsey
66	Address, phone and fax numbers of firm's principal office.	500 W. 13th St. Fort Worth, TX 76102 P. 1-800-728-2374. F. 281-664-3196	13430 Northwest Fry #600 Houston, Texas 77040
67	Contact information for the person and office that will be providing the consulting services to the District (if different than that of the firm's principal office).	Michael Avenevoli and Tommy Taylor P. 713-693-6111 / 806-674-2909	Carey S Malek 3625 Paesanos Parkway Suite 200 San Antonio, Texas 78231
68	Select type of ownership of firm:	corporation	corporation
69	History of the firm, including dates of predecessor firms (if any) and establishment of present firm.	Paul C. Higginbotham founded a personal insurance agency in his Fort Worth Riverside neighborhood in 1940. By 1943 with World War II raging, he was called to service and sold the agency. After returning from service, he started anew in 1948, operating the firm as a sole proprietorship from a single office in Fort Worth for four decades. Ownership changed in the early 1960s when Paul's nephew Bill Stroud purchased the firm, which he managed until 1989 when current President/CEO Rusty Reid assumed leadership and implemented a broad-based employee ownership structure that continues today.	Hotchkiss Insurance was founded in 1975 as a property & Causality, employee benefits, consulting, personal insurance and surety services. We have been family owned for almost 45 years and will continues in that capacity for the foreseeable future..
70	Minority status of the firm	Not Applicable	Not Applicable
71	Indicate the percentage of minority employees.	18%	24%
72	STATEMENT OF QUALIFICATIONS		
73	Agencies interested shall submit their detailed qualifications which should include their experience, qualifications of personnel that would be assigned to the District's account and resources they can make available to the District.	Please reference question #1 in the attachments "key Personnel and Professional Licenses"	A proposal has been attached to the documents section of the rfp. It outlines our services.

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Att #	Attribute Name	Higginbotham (Higginbotham Insurance Agency, Inc.)	Hotchkiss Insurance Agency
74	EXPERIENCE AND REFERENCES		
75	Consulting services experience with school districts in the past 5 years.	Higginbotham is currently working with over 100 School Districts and public entities. The scope of work varies from very specific project-based work to broad general and managing consultant duties. These duties include work in the areas of General Liability, Property, Automobile, Workers Compensation, Medical, Pharmacy, Student Accident, Ancillary Lines and Worksite Products. The team assembled for PSJA ISD is currently working with two Districts of similar size and scope of PSJA ISD. This is in keeping with our policy of allowing teams to have capacity to immediately engage with new clients and provide the service expected. The two consultants have over 50 years of combined experience on which to draw. The Consultants assigned to the District also have the authority and ability to assign additional resources as necessary to assure goals are reached.	A public entity resume has been attached to the document section of the rfq that outlines our consultants vast experience in this area.
76	Recent work experience with the District.	None	N/A
77	List the names, addresses and contract information of five references. References should be comparable sized District to Pharr-San Juan-Alamo ISD, if possible.	Please reference the attachment "References"	Sabine-Neches Navigation District Nederland, Texas Kristin Meehan, Operations Manager 409-729-4588 kmeehan@navigationdistrict.org ; Jefferson County Beaumont, Texas Phil Kelley, General Manager 409-985-4369 pkelley@dd7.org ; Lower Neches Valley Authority Scott Hall, General Manager 409-892-4011 shall@lnva.dst.tx.us ; Sabine River Authority Orange, Texas Debra Stagner Chief Admin Officer 409- 746-2192 dstagner@sratx.org
78	CURRENT ASSIGNMENTS		
79	Provide a statement concerning the consultant's ability and capacity to perform the work in relation to existing assignments. List the consultant's current workload and the availability to commence services immediately after being selected by the District	To facilitate communication and best serve our clients, Higginbotham's account personnel work in teams consisting of multiple consultants, marketers and customer service representatives grouped together by industry experience and geographic location. With personnel providing account services for consecutive policy terms, we become familiar with clients' operations, and likewise, clients become familiar with their service representatives. This team approach enables the free flow of ideas and helps guarantee consistency and quality of service. Team members can easily step in for each other because they are familiar with the accounts managed by the team as a whole. Higginbotham will be ready to commence services immediately upon being selected by the District.	as a recent addition our consultant assigned to your account will have ample time to take on work loads for new districts. He will be immediately available and ready to commence upon the execution of the services agreement.
80	SERVICES		
81	Provide a summary of services proposed to be provided by your firm. Do not list services provided through collaboration with outside firms.	Please Reference the attachment "Consultant Services Description"	A sample service proposal was added to the document section of the RFQ
82	If applicable, please include a sample agreement normally used by the firm, when providing these types of services. (Sample agreement may be uploaded on the Response Attachments tab.)		
83	AVAILABILITY		
84	Outline the procedures and timelines by which district staff will have access to consultant services.	The standard hours of operation for all Higginbotham offices are Monday through Friday 8:30 a.m. - 5:00 p.m. Lead Consultants and Account Managers are also available to their clients by mobile phone during non-business hours. Employees will also have access to the Employee Response Center for general questions regarding their Medical and Pharmacy benefits.	A service calendar is attached to the document section of the RFQ
85	EQUAL OPPORTUNITY		
86	Provide a statement that the firm will not discriminate against any employee or applicant for employment because of age, disabilities, race religion, sex, color, or national origin.	Higginbotham does not and will not discriminate against any employee or applicant for employment because of age, disabilities, race, religion, sex, color, or national origin.	Hotchkiss Insurance agency will not discriminate against any employee or applicant for employment because of age, disabilities, race religion, sex, color, or national origin.
87	SCOPE OF WORK The successful respondent will perform the following core services as part of the total employee benefits consulting services and any other coverage the District deems appropriate		
88	Review and develop a Request for Proposal to provide health insurance coverage by contracting with health insurance companies and or with third party administrators.	Yes	Yes
89	Itemize the costs associated with a Request for Proposal development; review the self-funded proposals, assessing for the District the most favorable proposals that offer the least amount of financial risk.	Yes	Yes
90	Analyze and evaluate the proposals submitted and prepare a written report of findings and recommendations, conducting bidders' conferences as appropriate and respond to bidders' questions.	Yes	Yes

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91	Review and coordinate vendor finalist presentations and assist in the development of plan recommendations.	Yes	Yes
92	EMPLOYEE BENEFIT CONSULTING AND MONITORING		
93	Ensure accurate follow through on all negotiated contractual self-funded arrangements made between PSJA ISD and any insurance carriers utilized by the District are strictly adhered to.	Yes	Yes
94	Provide current information on managed care delivery systems, including PPO and POS, and other current and emerging systems and any other general health care consulting advice.	Yes	Yes
95	Perform a rate analysis, evaluate and negotiate all renewals of each fiscal year.	Yes	Yes
96	Monitor administrators actuarial and renewal assumptions under the self-insured program.	Yes	Yes
97	Monitor all contracts and maximize management information available through all providers.	Yes	Yes
98	Intervene and resolve claim issues related to all self-insured plans when needed or requested.	Yes	Yes
99	Monitor claim performance according to any performance standards contracts the District may have with any provider. Recommend the establishment of additional performance standard agreement with vendors if there are service problems.	Yes	Yes
100	Monitor and coordinate self-insurance financial plans, including claim processing, excess insurance(s), banking arrangements, booklets, identification cards, plan documents and administrative/premium payments.	Yes	Yes
101	Assist and provide recommendations in order to fulfill compliance requirements of State and Federal regulations, statutes and mandates. (COBRA, HIPAA, ACA, etc.)	Yes	Yes
102	Assist with development of employee benefits statements, if requested.	Yes	Yes
103	Provide routine group benefit and general health care consulting advice. Assist the District in establishing a strategic plan for employee benefits. Provide ongoing analysis and planning of new approaches to employee benefits. Take the initiative to bring new ideas to the District working with the district-wide Insurance Committee to develop and provide policy direction.	Yes	Yes
104	Provide ongoing analysis of plan design, cost containment strategies and cost sharing alternatives available to the district while maintaining integrity of current contracts.	Yes	Yes
105	Provide information or testimony and or other litigation hearings pertaining to benefit issues.	Yes	Yes
106	Develop strategies for implementation of new benefit programs by, assisting with employee communications and meetings as new programs are implemented and about existing benefits and how to use them properly.	Yes	Yes
107	Inform the District of changing legislation and legal decisions affecting employee benefits. Advise and discuss methods to comply with these changes.	Yes	Yes
108	Assist District with implementation of new wellness programs, provide assistance, materials and resources for wellness program, employee education materials for healthy lifestyles and participation in health fairs.	Yes	Yes
109	Provide advice on data practices, records retention and privacy issues.	Yes	Yes
110	Prepare a servicing team available to District to be available at open enrollment meetings to explain the plans, amendments, issues and trends to employees enrolling in the benefit plans.	Yes	Yes
111	Attend the quarterly Insurance Committee Meetings.	Yes	Yes
112	Conduct workshops and or prepare reports for the Board of Trustees covering health insurance issues, cost trends, plan design options, utilization trends, and rating structures, and the advantages/disadvantages associated with various funding alternatives	Yes	Yes
113	All data and information developed or acquired remain the property of the District at the end of the contract, to include spreadsheets, reports and data bases.	Yes	Yes

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Att #	Attribute Name	Higginbotham (Higginbotham Insurance Agency, Inc.)	Hotchkiss Insurance Agency
114	EVALUATION CRITERIA & SELECTION PROCESS Evaluation Criteria shall be based off the following criteria: <input type="checkbox"/> Qualification/Experience - 30% <input type="checkbox"/> Experience with Same Size District - 20% <input type="checkbox"/> Technical Competence - 20% <input type="checkbox"/> Staffing Capabilities - 20% <input type="checkbox"/> Meeting the current and future needs of the District - 10% The Pharr - San Juan - Alamo ISD will follow the process below: <input type="checkbox"/> First, the district will set up interviews. <input type="checkbox"/> Second, the district will negotiate with the selected provider a contract at a fair and reasonable price. <input type="checkbox"/> If a satisfactory contract cannot be negotiated with the most highly qualified provider, the district shall formally end negotiations and select the next most highly qualified provider. <input type="checkbox"/> The Pharr - San Juan - Alamo ISD will continue the above process until a qualified provider is selected. <input type="checkbox"/> The Pharr - San Juan - Alamo ISD will present to the Board for approval. <input type="checkbox"/> The PSJA ISD Board of Trustees reserves the following rights, but not limited to: <input type="checkbox"/> Starting date to be negotiated <input type="checkbox"/> To terminate contract by giving a thirty (30) day written notice <input type="checkbox"/> To pay for services on a monthly basis <input type="checkbox"/> To reject any and all negotiated proposals <input type="checkbox"/> To waive any technicalities and informalities <input type="checkbox"/> To negotiate the terms of the proposal	acknowledge	acknowledge

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Att #	Attribute Name	HUB International	McGriff, Seibels & Williams of Texas, Inc
59	Will the bid/proposal deviate from specifications?	No	No
60	If yes, please specify: (Form B - Deviations from Specifications of General Terms Conditions Compliance Signature Form, MUST BE COMPLETED.)	NA	There are no deviations.
61	Business/Company Owner Name Please provide complete name of the business/company owner responding to the bid/proposal.	HUB International is a private equity firm mainly owned by Hellman and Friedman and hundreds of HUB employees.	Kelly King
62	Date of Establishment	JDW was established 1898, Effective September 1, 2012, JDW Insurance partnered with and was acquired by HUB International Insurance Services making us the largest privately-held insurance agency in the world.	1982
63 GENERAL INFORMATION			
64	Full name of firm	HUB International Insurance Services	McGriff, Seibels & Williams, Inc.
65	Names of all partners, shareholders and associates of firm.	HUB International is a private equity firm mainly owned by Hellman and Friedman and hundreds of HUB employees.	MSW Directors Jennifer S. Banner; K. David Boyer Jr.; Anna R. Cablik; Patrick C. Graney III; I. Patricia Henry; Kelly S. King; Louis B. Lynn, Ph.D.; Easter A. Maynard; Charles A. Patton; Nido R. Qubein; William J. Reuter; Tollie W. Rich Jr.; Christine Sears; Thomas E. Skains; Thomas N. Thompson MSW Officers Kelly S. King, Chairman and Chief Executive Officer; Christopher L. Henson, President and Chief Operating Officer; Daryl N. Bible, Senior Executive Vice President and Chief Financial Officer; Clarke R. Starnes III, Senior Executive Vice President and Chief Risk Officer; W. Bennett Bradley, Senior Executive Vice President and Manager of Operations Shared Services; Barbara F. Duck, Senior Executive Vice President and Chief Information Officer; Jim D. Godwin, Senior Executive Vice President and Chief Credit Officer; Donna C. Goodrich, Senior Executive Vice President and Treasurer; Robert J. Johnson Jr., Senior Executive Vice President and General Counsel, Secretary and Chief Corporate
66	Address, phone and fax numbers of firm's principal office.	201 E. Main Ste. 800. El Paso, Texas. 79901. (P) 915-206-6052. (F) 866-399-3972	5080 Spectrum Dr., Suite 900E Addison, TX 75001, (469) 232-2100 Fax (469) 232-2101
67	Contact information for the person and office that will be providing the consulting services to the District (if different than that of the firm's principal office).	Randy Mcgraw. Sr. Vice President. 201 E. Main Ste. 800. El Paso, Texas. 79901. (P) 915-206-6052. (F) 866-399-3972 (E) randy.mcgraw@hubinternational.com	(469) 232-2188, sgibbs@mcgriff.com
68	Select type of ownership of firm:	corporation	corporation
69	History of the firm, including dates of predecessor firms (if any) and establishment of present firm.	Please refer to "History of firm" Attachment. The system would not allow us to insert full history.	MSW was formed on August 4, 1982 when the firms of McGriff & Seibels, Inc. and Molton, Allen & Williams Insurance Corporation merged. Both of the original firms were founded before the turn-of-the-century. Although our company's roots reach back over 100 years, we are by no means traditional. On February 1, 2004, MSW joined the BB&T (NYSE symbol: BBT) family of companies to create the 5th largest insurance brokerage firm in the world. The MSW / BB&T combined operation serves clients from offices throughout the U.S. and internationally. The Dallas Office has been servicing accounts since 1998. MSW's Dallas Benefits service team currently consults for approximately 75 clients representing approximately 45,000 employees. MSW elected to partner with BB&T because of their commitment to support, and enhance the culture that led to MSW's success. MSW maintains its independence, customer focus and exceptional management team.
70	Minority status of the firm	Not Applicable	Not Applicable
71	Indicate the percentage of minority employees.	0%	13.5%
72 STATEMENT OF QUALIFICATIONS			
73	Agencies interested shall submit their detailed qualifications which should include their experience, qualifications of personnel that would be assigned to the District's account and resources they can make available to the District.	Please refer to full proposal. We were unable to attach our qualifications through this system.	MSW's Dallas office has been servicing municipality and school district accounts for over 20 years. MSW's Dallas service team currently provides Health and Welfare consulting services for over 30 public entities and school districts, representing over 45,000 employees. Through our tenure and experience we have become well versed with navigating the different intricacies that separate the public sector from the private sector. This includes providing services such as accurate and timely financial reporting that helps municipalities and school districts meet budgeting requirements; aiding in the design and implementation of RFP's for vendor services, while adhering to fair practice requirements; and aiding HR and financial staff in presenting findings and recommendations to governing Boards. Personnel Scott Gibbs, Senior Vice President will serve as the lead benefits consultant on the The Company account. Scott has been with MSW for over 16 years, serves on the MSW Executive Team and is the MSW Public Entity Benefits Practice Leader. He holds a Life and Health Insurance Counselor's License. In addition, he holds the certification of Certified Government Benefits Administrator through State and Local Government Benefits Association. (SALGBA) SALGBA is one of the largest professional organizations providing government entities with educational and collaborative support. He also serves on the Board of SALGBA and is a frequent speaker at regional and national conferences. Scott currently works with over 20 different public entity and school district clients providing creative financial solutions for all aspects of their health and welfare benefit plans. Cristina Palacios, Account Executive, will be the lead service-team member on The Company's account. Cristina has been with MSW for 7 years. Cristina has worked for 10 years in the employee benefits arena. Cristina provides expertise in helping clients develop creative solutions surrounding their health and welfare benefit programs. Nikki Ross, Account Services Representative, will provide additional customer service support to The Company's account. Nikki has been with MSW for 1 year and will assist Cristina with any day-to-day customer service issues. In addition to the MSW Service Team, PSJA ISD will have access to MSW's additional national resources listed below: Employee Benefits Compliance Kenneth Johnson, JDanne Hensley, JD, ARMLaura Clayman, JD, SHRM-CP Human Resources Services Janie Warner, SHRM-SCP Clinical Wellness Katie O'Neill, DCTom Lerche Benefits Administration & Technology Services Kristin Shirley, CIC Health and Welfare Actuary Edward Johnson, ASA, MAAA, ACA- Health and Welfare Actuary Steven Bull, MSPA, MAAA, FCA, EA- Pension Actuary Communications David Meckle

PHARR - SAN JUAN - ALAMO I.S.D.
REQUEST FOR QUALIFICATIONS (RFQ'S) FOR INSURANCE CONSULTANT SERVICES # 19-20-031
RFQ OPENING: 10/28/2019 @ 2:30 P.M.

Att #	Attribute Name	HUB International	McGriff, Seibels & Williams of Texas, Inc
74	EXPERIENCE AND REFERENCES		
75	Consulting services experience with school districts in the past 5 years.	Please refer to full proposal. We were unable to attach our Scope of Work through this system.	Please refer to the "Additional Information" attachment.
76	Recent work experience with the District.	HUB International has no prior experience with PSJA ISD.	McGriff does not have any recent work experience with the District.
77	List the names, addresses and contract information of five references. References should be comparable sized District to Pharr-San Juan-Alamo ISD, if possible.	Please refer to full proposal. We were unable to attach our references through this system.	Keller ISD - Sheri Rich, Director of Employee Benefits, (817) 744-1087, Sheri.rich@kellerisd.net ; Bexar County - Manuel Gonzalez, Director of Human Resources 210-335-0786, manuel.gonzalez@bexar.org ; Anthony Lopez, MBA - Assistant Director, Administrative Services, (956) 983-5098, Anthony.Lopez@co.cameron.tx.us ; Richardson ISD - Carrie Taylor Rambo, Benefits Manager, (469) 593-0345, carrie.rambo@risd.org ; City of Harlingen - Belinda Castillo, Risk, Benefits & Safety Manager, (956) 216-5042, bcastillo@myharlingen.us
78	CURRENT ASSIGNMENTS		
79	Provide a statement concerning the consultant's ability and capacity to perform the work in relation to existing assignments. List the consultant's current workload and the availability to commence services immediately after being selected by the District	Please refer to full proposal. We were unable to attach our Scope of Work through this system.	Scott Gibbs currently works with over 20 different public entity and school district clients providing creative financial solutions for all aspects of their health and welfare benefit plans. Services will begin immediately after being selected and a strategic benefit plan action timeline will be provided.
80	SERVICES		
81	Provide a summary of services proposed to be provided by your firm. Do not list services provided through collaboration with outside firms.	Please refer to full proposal. We were unable to attach our Scope of Work through this system.	Please refer to the "Additional Information" attachment.
82	If applicable, please include a sample agreement normally used by the firm, when providing these types of services. (Sample agreement may be uploaded on the Response Attachments tab.)		
83	AVAILABILITY		
84	Outline the procedures and timelines by which district staff will have access to consultant services.	Your HUB team will response to inquiries within 24 hours from initial contact.	Client calls and emails take priority in our daily activities. Clients will have all direct lines to MSW's employee benefits team members responsible for day-to-day service. Client's Human Resources team will have cell phone numbers and email addresses to all primary representatives for questions before and after business hours. Calls / Emails received: Before 1:00 p.m. will be returned same business day. After 1:00 p.m. will be returned the following business day.
85	EQUAL OPPORTUNITY		
86	Provide a statement that the firm will not discriminate against any employee or applicant for employment because of age, disabilities, race religion, sex, color, or national origin.	HUB International will not discriminate against any employee or applicant for employment because of age, disabilities, race religion, sex, color, or national origin.	McGriff Seibels & Williams, Inc. confirms that it will not discriminate against any employee or applicant for employment because of age, disabilities, race religion, sex, color, or national origin.
87	SCOPE OF WORK The successful respondent will perform the following core services as part of the total employee benefits consulting services and any other coverage the District deems appropriate		
88	Review and develop a Request for Proposal to provide health insurance coverage by contracting with health insurance companies and or with third party administrators.	Yes	Yes
89	Itemize the costs associated with a Request for Proposal development; review the self-funded proposals, assessing for the District the most favorable proposals that offer the least amount of financial risk.	Yes	Yes
90	Analyze and evaluate the proposals submitted and prepare a written report of findings and recommendations, conducting bidders' conferences as appropriate and respond to bidders' questions.	Yes	Yes

PHARR - SAN JUAN - ALAMO I.S.D.
REQUEST FOR QUALIFICATIONS (RFQ'S) FOR INSURANCE CONSULTANT SERVICES # 19-20-031
RFQ OPENING: 10/28/2019 @ 2:30 P.M.

Att #	Attribute Name	HUB International	McGriff, Seibels & Williams of Texas, Inc
91	Review and coordinate vendor finalist presentations and assist in the development of plan recommendations.	Yes	Yes
92	EMPLOYEE BENEFIT CONSULTING AND MONITORING		
93	Ensure accurate follow through on all negotiated contractual self-funded arrangements made between PSJA ISD and any insurance carriers utilized by the District are strictly adhered to.	Yes	Yes
94	Provide current information on managed care delivery systems, including PPO and POS, and other current and emerging systems and any other general health care consulting advice.	Yes	Yes
95	Perform a rate analysis, evaluate and negotiate all renewals of each fiscal year.	Yes	Yes
96	Monitor administrators actuarial and renewal assumptions under the self-insured program.	Yes	Yes
97	Monitor all contracts and maximize management information available through all providers.	Yes	Yes
98	Intervene and resolve claim issues related to all self-insured plans when needed or requested.	Yes	Yes
99	Monitor claim performance according to any performance standards contracts the District may have with any provider. Recommend the establishment of additional performance standard agreement with vendors if there are service problems.	Yes	Yes
100	Monitor and coordinate self-insurance financial plans, including claim processing, excess insurance(s), banking arrangements, booklets, identification cards, plan documents and administrative/premium payments.	Yes	Yes
101	Assist and provide recommendations in order to fulfill compliance requirements of State and Federal regulations, statutes and mandates. (COBRA, HIPAA, ACA, etc.)	Yes	Yes
102	Assist with development of employee benefits statements, if requested.	Yes	Yes
103	Provide routine group benefit and general health care consulting advice. Assist the District in establishing a strategic plan for employee benefits. Provide ongoing analysis and planning of new approaches to employee benefits. Take the initiative to bring new ideas to the District working with the district-wide Insurance Committee to develop and provide policy direction.	Yes	Yes
104	Provide ongoing analysis of plan design, cost containment strategies and cost sharing alternatives available to the district while maintaining integrity of current contracts.	Yes	Yes
105	Provide information or testimony and or other litigation hearings pertaining to benefit issues.	Yes	Yes
106	Develop strategies for implementation of new benefit programs by, assisting with employee communications and meetings as new programs are implemented and about existing benefits and how to use them properly.	Yes	Yes
107	Inform the District of changing legislation and legal decisions affecting employee benefits. Advise and discuss methods to comply with these changes.	Yes	Yes
108	Assist District with implementation of new wellness programs, provide assistance, materials and resources for wellness program, employee education materials for healthy lifestyles and participation in health fairs.	Yes	Yes
109	Provide advice on data practices, records retention and privacy issues.	Yes	Yes
110	Prepare a servicing team available to District to be available at open enrollment meetings to explain the plans, amendments, issues and trends to employees enrolling in the benefit plans.	Yes	Yes
111	Attend the quarterly Insurance Committee Meetings.	Yes	Yes
112	Conduct workshops and or prepare reports for the Board of Trustees covering health insurance issues, cost trends, plan design options, utilization trends, and rating structures, and the advantages/disadvantages associated with various funding alternatives.	Yes	Yes
113	All data and information developed or acquired remain the property of the District at the end of the contract, to include spreadsheets, reports and data bases.	Yes	Yes

PHARR - SAN JUAN - ALAMO I.S.D.
 REQUEST FOR QUALIFICATIONS (RFQ'S) FOR INSURANCE CONSULTANT SERVICES # 19-20-031
 RFQ OPENING: 10/28/2019 @ 2:30 P.M.

Att #	Attribute Name	HUB International	McGriff, Seibels & Williams of Texas, Inc
114	EVALUATION CRITERIA & SELECTION PROCESS Evaluation Criteria shall be based off the following criteria: <input type="checkbox"/> Qualification/Experience - 30% <input type="checkbox"/> Experience with Same Size District - 20% <input type="checkbox"/> Technical Competence - 20% <input type="checkbox"/> Staffing Capabilities - 20% <input type="checkbox"/> Meeting the current and future needs of the District - 10% The Pharr - San Juan - Alamo ISD will follow the process below: <input type="checkbox"/> First, the district will set up interviews. <input type="checkbox"/> Second, the district will negotiate with the selected provider a contract at a fair and reasonable price. <input type="checkbox"/> If a satisfactory contract cannot be negotiated with the most highly qualified provider, the district shall formally end negotiations and select the next most highly qualified provider. <input type="checkbox"/> The Pharr - San Juan - Alamo ISD will continue the above process until a qualified provider is selected. <input type="checkbox"/> The Pharr - San Juan - Alamo ISD will present to the Board for approval. <input type="checkbox"/> The PSJA ISD Board of Trustees reserves the following rights, but not limited to: <input type="checkbox"/> Starting date to be negotiated <input type="checkbox"/> To terminate contract by giving a thirty (30) day written notice <input type="checkbox"/> To pay for services on a monthly basis <input type="checkbox"/> To reject any and all negotiated proposals <input type="checkbox"/> To waive any technicalities and informalities <input type="checkbox"/> To negotiate the terms of the proposal	acknowledge	acknowledge

PHARR - SAN JUAN - ALAMO I.S.D.
REQUEST FOR QUALIFICATIONS (RFQ'S) FOR INSURANCE CONSULTANT SERVICES # 19-20-031
RFQ OPENING: 10/28/2019 @ 2:30 P.M.

Att #	Attribute Name	RWL Group (Robert W. Lazarus & Associates, Inc.)	Smith & Associates Consulting
59	Will the bid/proposal deviate from specifications?	No	No
60	If yes, please specify: (Form B - Deviations from Specifications of General Terms Conditions Compliance Signature Form, MUST BE COMPLETED.)	RWL Group will not deviate from the specifications of general terms and conditions. Form attached.	No deviations
61	Business/Company Owner Name Please provide complete name of the business/company owner responding to the bid/proposal.	Robert W. Lazarus, President	Smith and Associates Consulting -- Eric Smith, Owner/Managing Partner
62	Date of Establishment	1981	November, 1998
63 GENERAL INFORMATION			
64	Full name of firm	Robert W. Lazarus & Associates, Inc. dba RWL Group	Smith and Associates Consulting
65	Names of all partners, shareholders and associates of firm.	Robert W. Lazarus and Roberta A. Lazarus	Eric Smith, Managing Partner / Ryan Smith, President / William Shuler, Vice President
66	Address, phone and fax numbers of firm's principal office.	300 N. Coit Road, Suite 810, Richardson, TX 75080 Ph: 972-907-9095; Fax: 972-907-9198	Smith & Associates Consulting P.O. Box 92398 Southlake, Texas 76092 Phone: (817) 310 - 3422 Fax: (817) 310 - 3439
67	Contact information for the person and office that will be providing the consulting services to the District (if different than that of the firm's principal office).	Robert W. Lazarus; 972-907-9095	Eric Smith, Owner/Managing Partner, Smith & Associates Consulting P.O. Box 92398 Southlake, Texas 76092 Phone: (817) 310 - 3422 Fax: (817) 310 - 3439
68	Select type of ownership of firm:	corporation	sole proprietorship
69	History of the firm, including dates of predecessor firms (if any) and establishment of present firm.	Established in 1981. One-owner company.	Smith & Associates Consulting is an Employee Benefit Consulting firm based in the Dallas/Fort Worth Metroplex with a second office in Colorado. Delbert L. Smith founded Smith & Associates in 1986 and has been in the Healthcare industry for over 31 years. Eric Smith joined Smith & Associates as a Principal in 1995 and subsequently purchased the firm from Delbert Smith in 2000.
70	Minority status of the firm	Not Applicable	Not Applicable
71	Indicate the percentage of minority employees.	0%	0%
72 STATEMENT OF QUALIFICATIONS			
73	Agencies interested shall submit their detailed qualifications which should include their experience, qualifications of personnel that would be assigned to the District's account and resources they can make available to the District.	Please see proposal and proposal letter attached.	Since 1995 all of our clients have been Public Entities with the exception of one. Our client list has included Major Corporations, State and Local Governments, Federal Agencies, Schools, Counties, Insurance Companies, Health Maintenance Organizations, Preferred Provider Organizations, and Physician Groups. Services Offered: •Needs Analysis & Recommendations •Draft Request for Proposals •Analyze Proposals •Vendor Management •Wellness Program Design •Benefit Education & Communication Included in our extensive experience are a large number of assignments involving health and other insurance/benefit consulting services. Our specialties include Employee Benefit Cost Containment, Automated Benefit Systems Review. Smith & Associates Consulting employs two full-time staff members in our Texas office located in Southlake. Eric Smith and William Shuler run our Texas office, which would be managing PSJA ISD's account. Smith & Associates also has an office in Colorado, managed by Ryan Smith. Please see below for designation of assignments. Eric D. Smith - Principal Owner/Managing Partner; Eric has specialized in public entities throughout his entire career. His experience is unequalled in the industry in maintaining fiscally sound self-insured plans. Eric's key role in working with PSJA ISD would be as follows: •Perform diagnostic review, general consulting and actuarial analysis. •Evaluate medical trends and provide monthly revenue projections. •Provide PSJA ISD an estimate of recommended funding levels for reserves. •Day-to-day account management. •Assist PSJA ISD with fiscal year budget processes. •Meet with PSJA ISD staff, and member District staff as often as it is necessary to discuss all pertinent issues. •Assist in the development and analysis of Request for Proposals as needed. •Coordinate and participate in the interview process with potential vendors. •Manage the implementation process of new vendors, in addition to the day-to-day ongoing vendor management. •Provide assistance in resolving unique claim issues. •Assist in the review and development of Plan Documents. •Review, verify, and provide analytical due diligence on Agreements or Renewal Amendments. •Coordinate meetings between vendors and PSJA ISD, and member District, as needed. •Monitor all claim activity monthly and review reports in regard to PSJA ISD's, trends and utilization patterns. •Attend quarterly claims review meetings with PSJA ISD staff and Third-Party Administrators. •Inform PSJA ISD of any State or Federal legislation affecting their Health Benefit Programs. •Any other duties that the Consultant feels are necessary to insure PSJA ISD is fully informed as to the operation of its existing Health Benefit Programs. •Identify and coordinate any specific or aggregate reimbursements due to PSJA ISD which will include monitoring the timeliness of the Stop Loss reimbursements. Ryan Smith - President/Associate Partner •Data Analytics •Claims Audits •Disease Management and Wellness Plan Design Management William Shuler - Vice President/Client Services; William has assisted Smith & Associates Consulting with day-to-day communications and relations with our clients and vendors since joining the firm in 2019. His dedication to customer service and customer satisfaction gives our clients an advantage in today's market. His responsibilities to PSJA ISD would be as follows: •Handle communication between PSJA ISD and its vendors. •Assist with claims as they arise and provide negotiations. •Provide communication materials regarding benefit programs offered to the employees. •Assist with the open enrollment process. •Prepare and furnish PSJA ISD with an updated claim analysis spreadsheet, outlining plan financial performance on a monthly basis. •Assist in the development and analysis of Request for Proposals. •Provide administrative support. •Assist with any educational seminars or workshops for PSJA ISD as needed

PHARR - SAN JUAN - ALAMO I.S.D.
REQUEST FOR QUALIFICATIONS (RFQ'S) FOR INSURANCE CONSULTANT SERVICES # 19-20-031
RFQ OPENING: 10/28/2019 @ 2:30 P.M.

Att #	Attribute Name	RWL Group (Robert W. Lazarus & Associates, Inc.)	Smith & Associates Consulting
74	EXPERIENCE AND REFERENCES		
75	Consulting services experience with school districts in the past 5 years.	Please see references attached to proposal/contract.	Northwest ISD Consultant: 15 years – currently servicing Employees: 2500 Mesquite ISD Consultant: 10+ years – currently servicing Employees: 4000 Ector County ISD Consultant: 1 year – currently servicing Employees: 4000 Denton ISD Consultant: 20+ years Employees: 3000 Grapevine-Colleyville ISD Consultant: 5+ years Employees: 2500 Keller ISD Consultant: 4+ years Employees: 3000 Carrollton-Farmers Branch Consultant: 5+ years Employees: 2500 --- For all above listed clients, Services included: Employee Benefits Consultant with services related to Medical, Dental and Vision Plans, Cobra, HIPAA, Section 125/ Cafeteria Plan, Disability, Single Case Negotiations, Life Insurance, Hospital Indemnity Plans, Stop Loss Insurance, Implementation of Online Enrollment System, Implementation of an On-site Health and Wellness Center, and Comprehensive Wellness Programs.
76	Recent work experience with the District.	None	Not Applicable
77	List the names, addresses and contract information of five references. References should be comparable sized District to Pharr-San Juan-Alamo ISD, if possible.	Please refer to references in attached proposal/contract.	Northwest ISD, Kitty Poehler, Executive Director of Personnel Services 2001 Texas Drive Justin, Texas 76247 817-215-0071 kpoehler@nisdtx.org -- Mesquite ISD, Mary Randle Asst Superintendent of Personnel Services 3819 Towne Crossing Blvd. Mesquite Texas 75150 972-882-9746 mrandle@mesquiteisd.org -- Ector County ISD, Donna Zirliax, Direct of Benefits 802 N Sam Houston Odessa, Texas 79761 432-456-9789 Donna.zirliax@ectorcountyisd.org -- City of Midland, Tammy Belman, Benefit Coordinator, 300 North Loraine Midland, Texas 79702 432-685-7416 tbelman@midlandtexas.gov -- Dr. Jerry Maze, Executive Director, Education Service Center Region 12, 2101 W Loop 340, Waco, TX 76712 254-297-1214 jmaze@esc12.net
78	CURRENT ASSIGNMENTS		
79	Provide a statement concerning the consultant's ability and capacity to perform the work in relation to existing assignments. List the consultant's current workload and the availability to commence services immediately after being selected by the District	Please refer to proposal and proposal letter attached.	Our dedicated team currently services 5 clients in total, and is available to begin providing all applicable services to PSJA ISD immediately upon selection and mutual acceptance of agreement
80	SERVICES		
81	Provide a summary of services proposed to be provided by your firm. Do not list services provided through collaboration with outside firms.	Please refer to proposal and proposal letter attached.	Evaluation of Current Programs, Develop Renewal Strategy & Coordinate Bid Process, Implement Benefit Program Analysis of Funding Levels, Monitor and Report on Plan Utilization, Monitor Regulatory Compliance and Industry Trends
82	If applicable, please include a sample agreement normally used by the firm, when providing these types of services. (Sample agreement may be uploaded on the Response Attachments tab.)		
83	AVAILABILITY		
84	Outline the procedures and timelines by which district staff will have access to consultant services.	Services can be provided beginning immediately.	District will have access to consultant services via office phone, personal cell phone (all team members), and email at all times. Please allow up to 24 hours for response to email and/or other written requests. Smith and Associates prefers up to 48 hours for in-person meeting requests, but will be available within 24 hours to assuage any in person concerns.
85	EQUAL OPPORTUNITY		
86	Provide a statement that the firm will not discriminate against any employee or applicant for employment because of age, disabilities, race religion, sex, color, or national origin.	RWL Group does not discriminate because of age, race, religion, sex, color disability, or national origin.	Smith and Associates Consulting is an Equal Opportunity Employer. We do not discriminate on the basis of race, religion, color, sex, gender identity, sexual orientation, age, non-disqualifying physical or mental disability, national origin, veteran status or any other basis covered by appropriate law. All employment is decided on the basis of qualifications, merit, and business need.
87	SCOPE OF WORK The successful respondent will perform the following core services as part of the total employee benefits consulting services and any other coverage the District deems appropriate		
88	Review and develop a Request for Proposal to provide health insurance coverage by contracting with health insurance companies and or with third party administrators.	Yes	Yes
89	Itemize the costs associated with a Request for Proposal development; review the self-funded proposals, assessing for the District the most favorable proposals that offer the least amount of financial risk.	Yes	Yes
90	Analyze and evaluate the proposals submitted and prepare a written report of findings and recommendations, conducting bidders' conferences as appropriate and respond to bidders' questions.	Yes	Yes

PHARR - SAN JUAN - ALAMO I.S.D.
REQUEST FOR QUALIFICATIONS (RFQ'S) FOR INSURANCE CONSULTANT SERVICES # 19-20-031
RFQ OPENING: 10/28/2019 @ 2:30 P.M.

Att #	Attribute Name	RWL Group (Robert W. Lazarus & Associates, Inc.)	Smith & Associates Consulting
91	Review and coordinate vendor finalist presentations and assist in the development of plan recommendations.	Yes	Yes
92	EMPLOYEE BENEFIT CONSULTING AND MONITORING		
93	Ensure accurate follow through on all negotiated contractual self-funded arrangements made between PSJA ISD and any insurance carriers utilized by the District are strictly adhered to.	No	Yes
94	Provide current information on managed care delivery systems, including PPO and POS, and other current and emerging systems and any other general health care consulting advice.	No	Yes
95	Perform a rate analysis, evaluate and negotiate all renewals of each fiscal year.	No	Yes
96	Monitor administrators actuarial and renewal assumptions under the self-insured program.	No	Yes
97	Monitor all contracts and maximize management information available through all providers.	No	Yes
98	Intervene and resolve claim issues related to all self-insured plans when needed or requested.	No	Yes
99	Monitor claim performance according to any performance standards contracts the District may have with any provider. Recommend the establishment of additional performance standard agreement with vendors if there are service problems.	No	Yes
100	Monitor and coordinate self-insurance financial plans, including claim processing, excess insurance(s), banking arrangements, booklets, identification cards, plan documents and administrative/premium payments.	No	Yes
101	Assist and provide recommendations in order to fulfill compliance requirements of State and Federal regulations, statutes and mandates. (COBRA, HIPAA, ACA, etc.)	No	Yes
102	Assist with development of employee benefits statements, if requested.	No	Yes
103	Provide routine group benefit and general health care consulting advice. Assist the District in establishing a strategic plan for employee benefits. Provide ongoing analysis and planning of new approaches to employee benefits. Take the initiative to bring new ideas to the District working with the district-wide Insurance Committee to develop and provide policy direction.	No	Yes
104	Provide ongoing analysis of plan design, cost containment strategies and cost sharing alternatives available to the district while maintaining integrity of current contracts.	No	Yes
105	Provide information or testimony and or other litigation hearings pertaining to benefit issues.	No	Yes
106	Develop strategies for implementation of new benefit programs by, assisting with employee communications and meetings as new programs are implemented and about existing benefits and how to use them properly.	No	Yes
107	Inform the District of changing legislation and legal decisions affecting employee benefits. Advise and discuss methods to comply with these changes.	No	Yes
108	Assist District with implementation of new wellness programs, provide assistance, materials and resources for wellness program, employee education materials for healthy lifestyles and participation in health fairs.	No	Yes
109	Provide advice on data practices, records retention and privacy issues.	No	Yes
110	Prepare a servicing team available to District to be available at open enrollment meetings to explain the plans, amendments, issues and trends to employees enrolling in the benefit plans.	No	Yes
111	Attend the quarterly Insurance Committee Meetings.	No	Yes
112	Conduct workshops and or prepare reports for the Board of Trustees covering health insurance issues, cost trends, plan design options, utilization trends, and rating structures, and the advantages/disadvantages associated with various funding alternatives.	No	Yes
113	All data and information developed or acquired remain the property of the District at the end of the contract, to include spreadsheets, reports and data bases.	No	Yes

PHARR - SAN JUAN - ALAMO I.S.D.
 REQUEST FOR QUALIFICATIONS (RFQ'S) FOR INSURANCE CONSULTANT SERVICES # 19-20-031
 RFQ OPENING: 10/28/2019 @ 2:30 P.M.

Att #	Attribute Name	RWL Group (Robert W. Lazarus & Associates, Inc.)	Smith & Associates Consulting
114	EVALUATION CRITERIA & SELECTION PROCESS Evaluation Criteria shall be based off the following criteria: <input type="checkbox"/> Qualification/Experience - 30% <input type="checkbox"/> Experience with Same Size District - 20% <input type="checkbox"/> Technical Competence - 20% <input type="checkbox"/> Staffing Capabilities - 20% <input type="checkbox"/> Meeting the current and future needs of the District - 10% The Pharr - San Juan - Alamo ISD will follow the process below: <input type="checkbox"/> First, the district will set up interviews. <input type="checkbox"/> Second, the district will negotiate with the selected provider a contract at a fair and reasonable price. <input type="checkbox"/> If a satisfactory contract cannot be negotiated with the most highly qualified provider, the district shall formally end negotiations and select the next most highly qualified provider. <input type="checkbox"/> The Pharr - San Juan - Alamo ISD will continue the above process until a qualified provider is selected. <input type="checkbox"/> The Pharr - San Juan - Alamo ISD will present to the Board for approval. <input type="checkbox"/> The PSJA ISD Board of Trustees reserves the following rights, but not limited to: <input type="checkbox"/> Starting date to be negotiated <input type="checkbox"/> To terminate contract by giving a thirty (30) day written notice <input type="checkbox"/> To pay for services on a monthly basis <input type="checkbox"/> To reject any and all negotiated proposals <input type="checkbox"/> To waive any technicalities and informalities <input type="checkbox"/> To negotiate the terms of the proposal	acknowledge	acknowledge

PHARR - SAN JUAN - ALAMO I.S.D.
REQUEST FOR QUALIFICATIONS (RFQ'S) FOR INSURANCE CONSULTANT SERVICES # 19-20-031
RFQ OPENING: 10/28/2019 @ 2:30 P.M.

Att #	Attribute Name	Valley Risk Consulting
59	Will the bid/proposal deviate from specifications?	No
60	If yes, please specify: (Form B - Deviations from Specifications of General Terms Conditions Compliance Signature Form, MUST BE COMPLETED.)	No Deviations
61	Business/Company Owner Name Please provide complete name of the business/company owner responding to the bid/proposal.	Roger Garza
62	Date of Establishment	2004
63 GENERAL INFORMATION		
64	Full name of firm	Valley Risk Consulting
65	Names of all partners, shareholders and associates of firm.	N/A
66	Address, phone and fax numbers of firm's principal office.	1200 Fresno McAllen, TX 78501 (956) 664-1430 1-877-279-8119
67	Contact information for the person and office that will be providing the consulting services to the District (if different than that of the firm's principal office).	Roger Garza
68	Select type of ownership of firm:	corporation
69	History of the firm, including dates of predecessor firms (if any) and establishment of present firm.	Attached to "Response Attachments"
70	Minority status of the firm	HUB certified in Texas
71	Indicate the percentage of minority employees.	100%
72 STATEMENT OF QUALIFICATIONS		
73	Agencies interested shall submit their detailed qualifications which should include their experience, qualifications of personnel that would be assigned to the District's account and resources they can make available to the District.	Attached to "Response Attachments"

PHARR - SAN JUAN - ALAMO I.S.D.
REQUEST FOR QUALIFICATIONS (RFQ'S) FOR INSURANCE CONSULTANT SERVICES # 19-20-031
RFQ OPENING: 10/28/2019 @ 2:30 P.M.

Att #	Attribute Name	Valley Risk Consulting
74	EXPERIENCE AND REFERENCES	
75	Consulting services experience with school districts in the past 5 years.	Attached to "Response Attachments"
76	Recent work experience with the District.	None
77	List the names, addresses and contract information of five references. References should be comparable sized District to Pharr-San Juan-Alamo ISD, if possible.	Attached to "Response Attachments"
78	CURRENT ASSIGNMENTS	
79	Provide a statement concerning the consultant's ability and capacity to perform the work in relation to existing assignments. List the consultant's current workload and the availability to commence services immediately after being selected by the District	Our professional staff distributes work evenly to ensure timely delivery of reports and recommendations. Currently, we are working on several projects but have the capacity to retain additional assignments.
80	SERVICES	
81	Provide a summary of services proposed to be provided by your firm. Do not list services provided through collaboration with outside firms.	Attached to "Response Attachments"
82	If applicable, please include a sample agreement normally used by the firm, when providing these types of services. (Sample agreement may be uploaded on the Response Attachments tab.)	
83	AVAILABILITY	
84	Outline the procedures and timelines by which district staff will have access to consultant services.	Attached to "Response Attachments"
85	EQUAL OPPORTUNITY	
86	Provide a statement that the firm will not discriminate against any employee or applicant for employment because of age, disabilities, race religion, sex, color, or national origin.	We do not discriminate against any employee
87	SCOPE OF WORK The successful respondent will perform the following core services as part of the total employee benefits consulting services and any other coverage the District deems appropriate	
88	Review and develop a Request for Proposal to provide health insurance coverage by contracting with health insurance companies and or with third party administrators.	Yes
89	Itemize the costs associated with a Request for Proposal development; review the self-funded proposals, assessing for the District the most favorable proposals that offer the least amount of financial risk.	Yes
90	Analyze and evaluate the proposals submitted and prepare a written report of findings and recommendations, conducting bidders' conferences as appropriate and respond to bidders' questions.	Yes

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Att #	Attribute Name	Valley Risk Consulting
91	Review and coordinate vendor finalist presentations and assist in the development of plan recommendations.	Yes
92	EMPLOYEE BENEFIT CONSULTING AND MONITORING	
93	Ensure accurate follow through on all negotiated contractual self-funded arrangements made between PSJA ISD and any insurance carriers utilized by the District are strictly adhered to.	Yes
94	Provide current information on managed care delivery systems, including PPO and POS, and other current and emerging systems and any other general health care consulting advice.	Yes
95	Perform a rate analysis, evaluate and negotiate all renewals of each fiscal year.	Yes
96	Monitor administrators actuarial and renewal assumptions under the self-insured program.	Yes
97	Monitor all contracts and maximize management information available through all providers.	Yes
98	Intervene and resolve claim issues related to all self-insured plans when needed or requested.	Yes
99	Monitor claim performance according to any performance standards contracts the District may have with any provider. Recommend the establishment of additional performance standard agreement with vendors if there are service problems.	Yes
100	Monitor and coordinate self-insurance financial plans, including claim processing, excess insurance(s), banking arrangements, booklets, identification cards, plan documents and administrative/premium payments.	Yes
101	Assist and provide recommendations in order to fulfill compliance requirements of State and Federal regulations, statutes and mandates. (COBRA, HIPAA, ACA, etc.)	Yes
102	Assist with development of employee benefits statements, if requested.	Yes
103	Provide routine group benefit and general health care consulting advice. Assist the District in establishing a strategic plan for employee benefits. Provide ongoing analysis and planning of new approaches to employee benefits. Take the initiative to bring new ideas to the District working with the district-wide Insurance Committee to develop and provide policy direction.	Yes
104	Provide ongoing analysis of plan design, cost containment strategies and cost sharing alternatives available to the district while maintaining integrity of current contracts.	Yes
105	Provide information or testimony and or other litigation hearings pertaining to benefit issues.	Yes
106	Develop strategies for implementation of new benefit programs by, assisting with employee communications and meetings as new programs are implemented and about existing benefits and how to use them properly.	Yes
107	Inform the District of changing legislation and legal decisions affecting employee benefits. Advise and discuss methods to comply with these changes.	Yes
108	Assist District with implementation of new wellness programs, provide assistance, materials and resources for wellness program, employee education materials for healthy lifestyles and participation in health fairs.	Yes
109	Provide advice on data practices, records retention and privacy issues.	Yes
110	Prepare a servicing team available to District to be available at open enrollment meetings to explain the plans, amendments, issues and trends to employees enrolling in the benefit plans.	Yes
111	Attend the quarterly Insurance Committee Meetings.	Yes
112	Conduct workshops and or prepare reports for the Board of Trustees covering health insurance issues, cost trends, plan design options, utilization trends, and rating structures, and the advantages/disadvantages associated with various funding alternatives.	Yes
113	All data and information developed or acquired remain the property of the District at the end of the contract, to include spreadsheets, reports and data bases.	Yes

PHARR - SAN JUAN - ALAMO I.S.D.
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Att # Attribute Name	Valley Risk Consulting
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- 114 EVALUATION CRITERIA & SELECTION PROCESS
 Evaluation Criteria shall be based off the following criteria:
- Qualification/Experience - 30%
 - Experience with Same Size District - 20%
 - Technical Competence - 20%
 - Staffing Capabilities - 20%
 - Meeting the current and future needs of the District - 10%

acknowledge

The Pharr - San Juan - Alamo ISD will follow the process below:

- First, the district will set up interviews.
- Second, the district will negotiate with the selected provider a contract at a fair and reasonable price.
- If a satisfactory contract cannot be negotiated with the most highly qualified provider, the district shall formally end negotiations and select the next most highly qualified provider.
- The Pharr - San Juan - Alamo ISD will continue the above process until a qualified provider is selected.
- The Pharr - San Juan - Alamo ISD will present to the Board for approval.
- The PSJA ISD Board of Trustees reserves the following rights, but not limited to:
 - Starting date to be negotiated
 - To terminate contract by giving a thirty (30) day written notice
 - To pay for services on a monthly basis
 - To reject any and all negotiated proposals
 - To waive any technicalities and informalities
 - To negotiate the terms of the proposal

PHARR - SAN JUAN - ALAMO I.S.D.
REQUEST FOR QUALIFICATIONS (RFQ'S) FOR INSURANCE CONSULTANT SERVICES # 19-20-031
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Responding Supplier	Signature Full Name	Signature Email	Supplier Notes
Acrisure LLC dba Carlisle Insurance	Zach Gingrich	zachg@carlisleins.com	
Gallagher (Gallagher Benefit Service, Inc.)	Nick Long	nick_long@ajg.com	
Higginbotham (Higginbotham Insurance Agency, Inc.)	Tommy Taylor	ttaylor@higginbotham.net	
Hotchkiss Insurance Agency	Carey Malek	cmalek@hiallc.com	
HUB International	Randy McGraw	randy.mcgraw@hubinternational.com	
McGriff, Seibels & Williams of Texas, Inc	Scott M Gibbs	sgibbs@mcgriff.com	
RWL Group (Robert W. Lazarus & Associates, Inc.)	Robert W. Lazarus	bonnie@rwlgroup.com	RWL Group provides independent risk management and insurance consulting services in the property/casualty sector. We do not provide employee benefits services. We have no ties or affiliations with insurers or their companies.
Smith & Associates Consulting	Eric D smith	eric.smith@smith-associates.com	
Valley Risk Consulting	Roger Garza	roger@vrctx.com	

PHARR - SAN JUAN - ALAMO I.S.D.
REQUEST FOR QUALIFICATIONS (RFQ'S) FOR INSURANCE CONSULTANT SERVICES # 19-20-031
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Participation Summary - As of 02/14/2020

Participant Name	Response Date	Response Status	Contact	City	State	Zip Code	Invitation Type	Invitation Date	Owner
Acrisure LLC dba Carlisle Insurance	10/28/2019	Submitted	Chase Carlisle	Corpus Christi	TX	78401	Automatic	09/27/2019	
Gallagher (Gallagher Benefit Service, Inc.)	10/28/2019	Submitted		San Antonio	TX	78216	Automatic	09/27/2019	Publicly Traded
Higginbotham (Higginbotham Insurance Agency,	10/23/2019	Submitted	Tommy Taylor	Fort Worth	TX	76102			William Thomas Taylor, III and Michael Gerard Avenevoli
Hotchkiss Insurance Agency	10/28/2019	Submitted	Carey S Malek	San Antonio	TX	78231			Mike Hotchkiss, Douglas Hotchkiss, Ken Hotchkiss and Gree Hotchkiss
HUB International	10/28/2019	Submitted	Randy McGraw	El Paso	TX	79901			HUB International is a private equity firm mainly owned by Hellman and Friedman and hundreds of HUB employees.
McGriff, Seibels & Williams of Texas, Inc	10/23/2019	Submitted	Scott Gibbs	Addison	TX	75001			Kelly King
RWL Group (Robert W. Lazarus & Associates, Inc	10/11/2019	Submitted	Bonnie Kelly	Richardson	TX	75080			Robert W. Lazarus, President
Smith & Associates Consulting	10/21/2019	Submitted	ERIC SMITH	SOUTHLAKE	TX	76092			Eric Smith, Owner/Managing Partner
Valley Risk Consulting	10/28/2019	Submitted	Roger Garza	MCALLEN	TX	78501			Roger Garza
HonestRx Consulting LLC		Unsubmitted	Timothy Foster	Southlake	TX	76092			
PRECISION SAW & TOOL, INC	09/29/2019	No Bid	EDDIE HOMAN	CONVERSE	TX	78109			
Trinity3 Technology	09/27/2019	No Bid	Kendell Rickman	Saint Paul	MN	55114	Automatic	09/27/2019	
Youthlight, Inc.	10/17/2019	No Bid	Sandra C. McCarth	Chapin	SC	29036			
ASAP Printing Solutions (O'Conn LLC)		Viewed	Sean O' Connor	McAllen	TX	78501			
Bob Trevino Insurance		Viewed	Omar Carrasco	Pharr	TX	78577			
ConstructConnect		Viewed		Cincinnati	OH	45209	Automatic	09/27/2019	
Deltex		Viewed	Source Managemen	Herndon	VA	20171			
Express Booksellers (Express Booksellers, LLC)		Viewed	Jule Maxwell	Dallas	TX	75247			
FBMC Benefits Management, Inc.		Viewed	Brenda Welch	Tallahassee	FL	32303			
Financial Benefit Services		Viewed	Coby James	RICHARDSON	TX	75082	Automatic	09/27/2019	
Floral Park Consulting LLC		Viewed		Floral Park	NY	11001	Automatic	09/27/2019	
Franklin Covey Client Sales Inc.		Viewed	Tom Osborn	Salt Lake City	UT	84119	Automatic	09/27/2019	
Gloria E Cepeda		Viewed	Gloria E Cepeda	Harlingen	TX	78550			
Jara's Violin Bow Shop		Viewed	Manny Jara	Edinburg	TX	78542			
Jeans Restaurant Supply (Tari Inc.)		Viewed	ALBERT CHAVEZ	McAllen	TX	78501			
Mercer Technologies Firm		Viewed	Garrett Mercer	Gary	IN	46402	Automatic	09/27/2019	
Ortegon Insurance Agency LLC		Viewed	Yvonne M. Ortego	Weslaco	TX	78596	Automatic	09/27/2019	
Puro Aseguro Inc		Viewed	Melba Figueroa	Pharr	TX	78577	Automatic	09/27/2019	
RCA Building Materials Inc.		Viewed	Gustavo Rea	Pharr	TX	78577			
SA Benefit Services, LLC		Viewed	Stephanie Chtata	San Antonio	TX	78253	Automatic	09/27/2019	
Urban Infrastructure Group, Inc.		Viewed	Craig Gonzalez	Donna	TX	78537			
365 Paving & Construction LLC			Gilberto Maldonac	Mission	TX	78572	Automatic	09/27/2019	
All American Poly				Piscataway	NJ	08854	Automatic	09/27/2019	
All Valley Charters, LLC			Laurie Coffey	MCALLEN	TX	78502	Automatic	09/27/2019	
ALPHA CUSTOM SHIRTS				edinburg	TX	78577	Automatic	09/27/2019	
AssetGenie, Inc. DBA AGRepair and AGParts Edu			Tina Covalesky	Greensburg	PA	15601	Automatic	09/27/2019	
Baiza and Associates Consulting, LLC			Melinda Baiza	Austin	TX	78717	Automatic	09/27/2019	
Bocci Engineering			Simone Williams	Houston	TX	77070	Automatic	09/27/2019	
Brewster's Guacamaya Enterprises			Frank Brewster III	Mission	TX	78572	Automatic	09/27/2019	
Brock and Brock Enterprises			Tara Brock	Sunnyvale	TX	75182	Automatic	09/27/2019	
CHRE / Cindy Hopkins Real Estate			CYNTHIA HOPKINS	Harlingen	TX	78552	Automatic	09/27/2019	
Construction Journal LLC			Pamela Exton	Stuart	FL	34994	Automatic	09/27/2019	
Dannenbaum Engineering Co			Mirna Santana	McAllen	TX	78504	Automatic	09/27/2019	
Davis Vision, Inc.				Dallas	TX	75284-037	Automatic	09/27/2019	
Dell Marketing, L.P.			Aaron Rodriguez	Round Rock	TX	78682	Automatic	09/27/2019	
Devin Distributing & Packaging Inc.			Sandra Salinas	Palmhurst	TX	78573	Automatic	09/27/2019	
DMR Educational Consulting			Diana M. Ramirez	Los Fresnos	TX	78566	Automatic	09/27/2019	
Dr. Ruby K. Payne, dba aha! Process, Inc.			Michelle Kalish	Highlands	TX	77562-072	Automatic	09/27/2019	
ECOEFFECT			Alejandro Alanis	McAllen	TX	78501	Automatic	09/27/2019	
Econ Group, LLC			Gilbert Enriquez	Edinburg	TX	78540	Automatic	09/27/2019	
ENFANT JORDI DAYCARE AND LEARNING CENTEF			ANGELA MARIA CC	SAN JUAN	TX	78589	Automatic	09/27/2019	
GRANDE VALLEY BUILDERS,INC			MANUEL PEREZ	MCALLEN	TX	78501	Automatic	09/27/2019	
Guzman & Muñoz Engineering and Surveying, Inc			Jose L. Muñoz	Mercedes	TX	78570	Automatic	09/27/2019	
HAZELDEN PUBLISHING (HAZELDEN BETTY FORD			HELEN ALSAID	CENTER CITY	MN	55012	Automatic	09/27/2019	
Heinemann (Greenwood Publishing LLC)			Lori Lampert	Portsmouth	NH	03801	Automatic	09/27/2019	
Hi-LoContractor LLC			Edmundo Carreon	Elsa	TX	78543	Automatic	09/27/2019	
Hunt & Woodruff Construction Co LLC			Keith F. Hunt	Laguna Vista	TX	78578	Automatic	09/27/2019	
Insight			Darak Weaver	McAllen,	TX	78501	Automatic	09/27/2019	
JRF INDUSTRIES LLC			JOHN R FLOOD	SAN ANTONIO	TX	78209	Automatic	09/27/2019	
Leadership Empowerment Group			Dr. Barbara Bagge	MERCEDES	TX	78570	Automatic	09/27/2019	
Library Video Company d/b/a SAFARI Montage				West Conshohocke	PA	19428	Automatic	09/27/2019	
Little Giants Learning Center				Alamo	TX	78577	Automatic	09/27/2019	
Lowman Consulting LLC			John Lowman	Sachse	TX	76227	Automatic	09/27/2019	
Lydia Savedra Consulting			Lydia Savedra	McAllen	TX	78504	Automatic	09/27/2019	
MatScience Inc.			Barbara S. Brown	Dallas	TX	75209	Automatic	09/27/2019	
Maxim Healthcare Services				Tacoma	WA	98409	Automatic	09/27/2019	
McGriff, Seibels & Williams, Inc.				Houston	TX	77024	Automatic	09/27/2019	
MSB Consulting				Austin	TX	78750	Automatic	09/27/2019	
Newkirk & Newkirk, Inc.			Pierre Newkirk	McAllen	TX	78501	Automatic	09/27/2019	
PEARLIZED MATHEMATICS CONSULTING, LLC			Pearl I. Cantu	McAllen	TX	78504	Automatic	09/27/2019	
Pediatric Urgent Care			Brian White	Fort Worth	TX	76107	Automatic	09/27/2019	
Program Evaluation & Educational Research Solu			Eleazar Ramirez	Dallas	TX	75360	Automatic	09/27/2019	
Public Consulting Group Inc			Maureen Farrell	Boston	MA	02109	Automatic	09/27/2019	
Rebecca Sanchez			Rebecca Sanchez	San Juan	TX	78589	Automatic	09/27/2019	
Renaissance Learning				Wisconsin Rapids	WI	54494	Automatic	09/27/2019	
RGV GUARDIAN ENTERPRISES LLC DBA DERTY SP			Rick Romo	PHARR	TX	78577	Automatic	09/27/2019	

PHARR - SAN JUAN - ALAMO I.S.D.
REQUEST FOR QUALIFICATIONS (RFQ'S) FOR INSURANCE CONSULTANT SERVICES # 19-20-031
RFQ OPENING: OCTOBER 28, 2019 @ 2:30 P.M.

Participation Summary - As of 02/14/2020

<u>Participant Name</u>	<u>Response Date</u>	<u>Response Status</u>	<u>Contact</u>	<u>City</u>	<u>State</u>	<u>Zip Code</u>	<u>Invitation Type</u>	<u>Invitation Date</u>	<u>Owner</u>
RGVCM Group, Consultants & Managers (RGVCM)			Jose A. Lopez	Edinburg	TX	78539	Automatic	09/27/2019	
Romo Contractors, LLC			Romo Contractors	Laredo	TX	78046	Automatic	09/27/2019	
Say and Tell Therapy, LLC				San Juan	TX	78589	Automatic	09/27/2019	
Sharon Wells Mathematics Curriculum Inc.			Vanessa Hamel	Edinburg	TX	78540	Automatic	09/27/2019	
SIP-Student Insurance Plans				Frisco	TX	75034	Automatic	09/27/2019	
SRC Solutions, Inc.				Center Valley	PA	18034	Automatic	09/27/2019	
Sylvan Learning, LLC				Hunt Valley	MD	21030	Automatic	09/27/2019	
TCG Group Holdings (TCG Group Holdings, LLP)				AUSTIN	TX	78748	Automatic	09/27/2019	
Texas Kids First (Texas Kids First , LLC)			Ted Evans	Oklahoma City	OK	73134	Automatic	09/27/2019	
The Certified Welding and Testing Co.			Richard DePue	Springville	NY	14141	Automatic	09/27/2019	
The College Board				Austin	TX	78735	Automatic	09/27/2019	
The PlanIT Room			Cecilia Hernandez	El Paso	TX	79925	Automatic	09/27/2019	
Triggers Media			Bobby Villarreal	McAllen	TX	78504	Automatic	09/27/2019	
Trinity Review Services, Inc			Johnny L. Rogers	Desoto	TX	75123	Automatic	09/27/2019	
USI Southwest, Inc.			Jim Brundage	El Paso	TX	79903	Automatic	09/27/2019	
Vertex Marketing			Dr. Sue Bayer	Stafford	TX	77477	Automatic	09/27/2019	
Writer			David Rice	Austin	TX	78745	Automatic	09/27/2019	
Zuniga's House Mover, LLC			Hugo A Zuniga	San Juan	TX	78589	Automatic	09/27/2019	