

2526-7

Independent Employee Benefits Consulting Services Health & Medical Plans

Issue Date: 10/19/2026
Questions Deadline: 11/3/2026 10:00 AM (CT)
Response Deadline: 11/10/2026 10:00 AM (CT)

Contact Information

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Event Information

Number:	2526-7
Title:	Independent Employee Benefits Consulting Services Health & Medical Plans
Type:	Request for Proposal
Issue Date:	10/19/2026
Question Deadline:	11/3/2026 10:00 AM (CT)
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Bid Activities

RFP Release / First Advertisement Date	10/17/2026 6:00:00 AM (CT)
Deadline for Written Questions via IonWave	11/3/2026 10:00:00 AM (CT)
RFP Response Due Date & Opening	11/10/2026 10:00:00 AM (CT)

Bid Attachments

1295 Form (unsworn declaration) (2).pdf — Download

Certificate of Interested Parties (Form 1295) Please file online.

CIQ 1-21-21.pdf — View Online

A vendor must file a Form CIQ if the vendor has employment or other business relationship with a local government officer or a school district employee who is in a decision-making capacity.

SISD Vendor Insurance Requirements.pdf — View Online

District Insurance Requirements

Purchase Order Terms and Conditions Rev 1-2026.pdf — View Online

Purchase Order Terms and Conditions

Sharyland ISD Terms Conditions Rev. 10-2026.pdf — View Online

Sharyland ISD Terms Conditions

Appendix A and F.pdf — View Online

Appendix A and F

W-9 3-2024.pdf — View Online

W-9

Requested Attachments

CIQ

(Attachment required)

If there is a conflict of interest with the district, please upload your CIQ. If none exist, Just enter NA, sign, and upload.

1295 Form

(Attachment required)

Fill this form online at https://www.ethics.state.tx.us/filinginfo/1295/ You need to create your own account. Download a copy of the form when done and upload it here.

W-9 Form

(Attachment required)

W-9 Form

Insurance Form Requirement

(Attachment required)

Insurance Requirements. Copy of insurance certificates.

RFP Response Packege

A copy of your proposal to provide additional information or supporting details.

Submission of a paper copy does not replace, satisfy, or waive any requirements to complete and submit the questionnaire through Ion Wave

Bid Attributes

1	**Purpose Of Request** The purpose of this Request for Proposal (RFP) is to solicit written proposals from qualified benefits consulting firms (the “Firm”) to establish a contract through competitive sealed responses for employee benefits consulting services. The District requires an independent benefits consultant to strategically plan, advise, implement, and support our current and future employee benefits programs. The District seeks an independent employee benefits consultant to provide objective, fee-based advisory services. The selected firm shall disclose all actual, potential, and perceived conflicts of interest, including financial relationships with carriers, third-party administrators, pharmacy benefit managers, and other benefit providers. The selected firm shall not receive commissions or other undisclosed compensation in connection with the District's account. The firm shall identify and manage any conflicts in accordance with the District's written requirements. This solicitation does not authorize the firm to contact carriers or solicit insurance proposals on behalf of the District without prior written authorization from the designated Purchasing Official.
2	**Background and Existing Plan Descriptions** The Sharyland Independent School District is a public school district governed by the Texas Education Agency. We currently employ 1254 full time employees with approximately 815 eligible dependents. With approximately 1,200 employees, our largest benefit plans are 1. Self-funded health care plans currently administered by Blue Cross Blue Shield of Texas 2. Pharmacy Prescription Plan currently administered by Araya Benefit Management 3. Worker’s compensation insurance currently administered by Employers Assurance Insurance Company Next scheduled expiration date on all employee group benefit plans is December 31, 2027. This includes health (prescription coverage included), dental, vision, basic life and AD&D, supplemental life, and short and long term disability. Annual open enrollment generally begins the 1st week of October. A description of our current benefits is attached to this RFP as Appendix A and F.

3	**Scope of Work** Sharyland ISD is evaluating the option of selecting a benefits consulting firm to strategically plan, consult, implement, and support our employee benefits programs. Our goal is to select the firm who will be the most effective and proactive partner in assisting us to achieve the most beneficial access to plan funding designs, insurance carriers and benefits providers to assist the District with the design and development of the annual Request for Proposals, evaluating and identifying high value proposals and comprehensive services for each benefit offered to District employees, including but not limited to: • Health / medical plan, Prescription Drug plan • Dental plan • Basic Life Insurance with AD&D • Optional Life Insurance • Vision Insurance • Short-term and Long-term disability • EAP (Employee Assistance Plan) • FSA / COBRA / HIPAA / FMLA administration • Property and Casualty • Worker's Compensation **Core Services and Optional Services** The core scope of this solicitation is employee benefits consulting and advisory services. Respondents shall identify which services are included in the proposed fixed fee and separately identify optional services, third-party services, and any additional charges. Administrative services, insurance placement, brokerage, claims administration, and other services requiring separate authorization shall not be deemed included unless expressly identified in the awarded contract.

4 RFP Objective Statement

Sharyland Independent School District (the “District”) seeks proposals from qualified employee benefits consulting firms with a proven track record of developing innovative, cost-effective strategies that maintain high-quality employee benefits while containing or reducing costs.

The selected firm will provide comprehensive consulting and support services for the evaluation, procurement, implementation, administration, communication, compliance, renewal, and ongoing improvement of the District’s employee benefits programs.

All procurement, renewal, negotiation, market solicitation, and carrier-placement activities shall be performed only within the authority expressly granted by the District in writing and in accordance with applicable procurement requirements. Unless separately authorized, the consultant's role is limited to analysis, planning, recommendations, and preparation of procurement materials.

Services shall include, but not be limited to:

- **Benefits Analysis and Financial Management:** Evaluate plan performance, utilization, costs, funding options, and market competitiveness; identify cost-saving opportunities; provide financial projections, benchmarking, reporting, and strategic recommendations.
- **Carrier and Vendor Management:** Support procurement, renewals, negotiations, contract reviews, and performance monitoring while advocating for the District’s interests and maintaining direct communication between the District, carriers, and providers.
- **Employee Support and Benefits Communication:** Assist with claims resolution, employee advocacy, open enrollment, new-hire orientation, benefits education, wellness initiatives, and the development of clear, accessible communication materials and enrollment tools.
- **Regulatory Compliance and Administration:** Advise on applicable federal and state requirements, support mandated reporting and audits, and recommend improvements to enrollment, billing, and other administrative processes.
- **Strategic Planning and Continuous Improvement:** Develop annual and long-term benefits strategies, assess employee needs and satisfaction, evaluate emerging trends and market conditions, manage plan transitions, and recommend enhancements that promote employee well-being, operational efficiency, and long-term financial sustainability.

The selected firm shall work collaboratively with District leadership, staff, and other consultants; provide timely, accurate, and transparent reporting; and attend meetings as requested. The firm must support the District’s ability to make informed, data-driven decisions and demonstrate measurable value through service quality, cost management, and continuous improvement.

The District values an open, collaborative relationship with insurance carriers and vendors across all benefit lines. The selected firm shall not serve as the District’s exclusive point of contact with carriers or vendors, nor restrict direct communication between the District and its benefit providers.

5 Deliverables and Performance Reporting

The consultant shall develop an annual work plan with the District identifying deliverables, responsible parties, milestones, and target completion dates. At a minimum, the consultant shall provide an initial benefits assessment, periodic financial and service reports, compliance updates, renewal planning recommendations, and an annual performance summary, as applicable to the approved scope.

The consultant shall provide a quarterly written status report identifying completed work, outstanding issues, recommendations, and upcoming deadlines. The District shall establish meeting frequency, response-time expectations, and escalation procedures at contract kickoff.

6 RFP Instructions

Electronic Submission via IonWave

All proposals shall be submitted electronically through the District's IonWave procurement portal by the date and time stated in the Event Information and Bid Activities sections. Respondents are responsible for allowing sufficient time to complete and submit all required fields and attachments.

Only proposals successfully submitted in IonWave by the stated deadline will be considered, subject to applicable law and the District's published procedures. Respondents shall monitor IonWave for addenda and other official procurement notices.

Restriction on Communication & Single Point of Contact

From the RFP release date until formal award by the Board of Trustees, Offerors shall communicate ONLY through the designated Purchasing Official via the IonWave messaging module. Direct contact with any other District employee, administrator, committee member, or Board of Trustees member regarding this procurement is strictly prohibited and may result in disqualification.

Purchasing Contact: Jesse Salazar, Purchasing Department
Address: 1200 N. Shary Road, Mission, TX 78572
Email: jgsalazar@sharylandisd.org | Phone: (956) 580-5200 Ext. 1045
Strict Blind Evaluation Requirement (No-Branding Mandate)

To ensure absolute fairness, transparency, and impartiality, the Evaluation Committee will evaluate proposals using a blind review process based strictly on technical merit, approach, experience, and fee structure.

NOTICE OF STRICT BLIND EVALUATION & NON-RESPONSIVE DETERMINATION:

Respondents shall not include firm names, logos, website addresses, or other identifying information in fields designated for blind technical evaluation. Required identity, signature, tax, conflict disclosure, and other administrative documents shall be submitted in the designated IonWave response attachment fields.

The District will determine how to handle an inadvertent disclosure of respondent identity in a technical response in accordance with the published solicitation requirements and applicable law.

Offer Validity

Proposals shall remain valid and open for acceptance for a period of ninety (90) calendar days from the proposal opening date. All costs associated with preparing and submitting a response are solely the responsibility of the Respondent.

7 Must Attach

Be sure to upload all required documents and forms to the ”Response Attachments” Tab.

8 Introduction

There are attributes, including this one, associated with this proposal. Some are notes and require no response, but most have a required response. ***Please select each page on the right-hand side of the blue bar below (at the bottom of this list of attributes) in order to view the next page of Bid Attributes.***

9 Communications Statement

Communications: Contact between vendors and SISD personnel during the proposal process or evaluation process is prohibited. Any attempt by vendors during the proposal process to contact SISD personnel may result in disqualification. All questions and communications concerning this solicitation shall be submitted through the IonWave messaging module to the designated Purchasing Official by the stated deadline. Only written responses issued by the District through an official addendum shall modify or clarify the solicitation. No verbal statement shall amend the solicitation.

10 Proposal Opening

Proposals must be successfully submitted through IonWave by the deadline specified in the solicitation. Late submissions will not be considered except as required by applicable law or under an officially announced extension or other procedure authorized by the District. If the District extends the deadline due to a closure or system disruption, the District will communicate the revised deadline through official procurement channels.

11 Deviations

Does your bid/proposal include any deviations from the attached terms, conditions, and specifications?

☐ Yes ☐ No

(Required: Check only one)

12 Deviations Noted

If your firm intends to deviate from the terms and conditions listed in the attached documents, all such deviations must be listed here, with complete and detailed conditions and information included. Sharyland ISD will consider any deviations in its bid/proposal award decisions. Additionally, the District reserves the right to accept or reject any bid/proposal based upon any deviations indicated below. If none, you may enter N/A (not applicable).

(Optional: Maximum 1000 characters allowed)

13 Contract Term

The initial contract term shall be two (2) years. The District may, at its sole discretion and subject to applicable approvals, renew the contract for up to four (4) additional one-year periods. The total contract term shall not exceed six (6) years. Renewal shall be subject to satisfactory performance, available funding, and any required District approval.

14 Right to Terminate

The District may terminate the contract for convenience by providing at least thirty (30) calendar days' written notice, subject to applicable law and the executed contract.

The District may terminate for cause in accordance with the contract's default, notice, and cure provisions. Upon termination, the consultant shall cooperate in an orderly transition, return or securely transfer District information as directed, and provide outstanding work products for which the District is entitled under the contract. Payment shall be handled in accordance with the contract for services properly performed and accepted through the effective termination date.

15 Applicable Law and Venue

Any resulting contract is governed by, and subject to, the laws of the State of Texas without regard to conflict of law principles. For purposes of litigating any dispute that arises directly or indirectly from the relationship of the parties, State of Texas shall be the exclusive jurisdiction and any such litigation shall be conducted only in the courts of Hidalgo County, Texas, or the federal courts for the United States for the Southern District of Texas, and no other courts.

16 Compliance

Vendor shall be at all times in compliance with all District, local, state, or federal mandatory observances, laws, requirements, regulations, standards, and policies.

17 Severability

A declaration by any court, or other binding legal source, that any provision of the contract formed out of this proposal is illegal and void, will not affect the legality and enforceable of any other provision of the contract, unless mutually dependent.

18	**No Waiver** If either party fails, at any time, to enforce any right or remedy available to it under a contract formed out of this Proposal, that failure shall not be construed to be a waiver of the right or remedy with respect to any other breach or failure by the other party.

19	**Contract Dispute Resolution and Reparation** The parties shall attempt to resolve contract disputes through good-faith discussions between authorized representatives. Nothing in this provision waives any rights, remedies, defenses, or immunities available to the District under applicable law. If the consultant fails to perform a material contractual obligation, the District may provide written notice describing the default and, when appropriate, an opportunity to cure within a period specified by the District. The District may exercise the remedies available under the executed contract and applicable law, including termination for cause when authorized. Any recovery of additional costs, damages, or other remedies shall be subject to the contract and applicable law. No additional daily charge or liquidated-damages amount shall apply unless expressly approved by the District and included in the executed contract.

20	**Proposal Price** The proposed fixed fee shall include all services, personnel, travel, administrative costs, and other expenses necessary to perform the scope of work, except for items expressly identified as optional or separately reimbursable in the proposal. Respondents shall identify all additional fees, optional services, assumptions, exclusions, and proposed reimbursement arrangements. No additional charge shall be payable unless authorized in writing by the District in accordance with the executed contract.

21	**Payment for Goods and Services** Payment for goods and services shall be governed by Texas Government Code 2251. Invoices shall identify the services performed, applicable billing period, contract fee or authorized additional charge, and supporting documentation reasonably required by the District. Payment shall be governed by the executed contract and applicable Texas prompt-payment law. The District may dispute an invoice in accordance with applicable law and the contract, providing an explanation of the disputed amount when required.

22	**Proposal Preparation and Response Costs** All travel, proposal preparation costs, and any costs related to the Vendors submitting a response to this proposal request shall be borne by the Vendor. The District will not be responsible for any Vendor expenses attributable to the preparation or response to this proposal request.

23	**Insurance Requirement** The Offeror shall provide the District with a Certificate of Insurance on an ACORD or equivalent form evidencing the existence of all required policies prior to the commencement of the contract term. The Certificate shall be submitted to the address specified under the District Insurance Requirements in the Attachments tab. The Certificate of Insurance, along with a separate Additional Insured Endorsement, shall designate the District as an Additional Insured on all applicable liability policies. Each policy shall contain a provision or endorsement requiring at least thirty (30) days' prior written notice to the designated District representative in the event of policy cancellation or material change. A renewal certificate shall be delivered to the District at least thirty (30) days prior to the expiration date of any expiring policy. If at any time any required policy or insurer becomes unsatisfactory to the District in form or substance, the Offeror shall, upon demand, deliver a certified copy of the requested policy to the District representative for review.

24 Terms and Conditions Acknowledgement

The respondent acknowledges that it has reviewed the solicitation, the District's applicable purchase order terms and conditions, and the other attachments identified in the event. The respondent agrees that any requested exceptions must be disclosed in the designated deviations section. The executed contract shall govern the parties' obligations, subject to applicable law.

☐ I Certify

(Optional: Check if applicable)

25 Evaluation Criteria

The content of your proposal and responses to the illustrations and questionnaires will be weighed in the evaluation process. Sharyland Independent School District's highest priority is to secure the best possible program for the health plan.

The following criteria will be evaluated:

According to the Texas Education Code, Subchapter B, Section 44.031 (b), in determining to whom to award a contract, the district shall consider the following:

Texas K–12 experience and comparable clients	15%
Technical methodology and annual work plan	20%
Account team qualifications and service capacity	15%
Independence, transparency, and conflict management	15%
References and demonstrated performance	10%
Deliverables, responsiveness, and transition plan	10%
Total proposed fee and long-term cost	15%
Total	100%

Proposals will be evaluated for responsiveness and then scored using the criteria and weighting published in this solicitation. Evaluation may consider relevant experience, qualifications, technical approach, service capability, independence and conflict management, references, proposed deliverables, total proposed fees, and other specifically stated criteria consistent with applicable law.

The District will document its best-value determination and obtain the approvals required for award. The District may conduct interviews or request a best and final offer only as permitted by the solicitation and applicable law.

26 Best and Final Offer (BAFO)

The District may request a best and final offer from selected respondents when permitted by the solicitation and applicable law. The request will identify the components for which a revised offer is sought and the submission deadline. The District reserves the right to evaluate revised offers in accordance with the published criteria.

27 Opportunity for Interview, Discussion/Negotiation, and/or Oral Presentation/Product Demonstration

The District may invite respondents to participate in interviews, presentations, or clarification sessions to the extent permitted by the solicitation and applicable law. Any requested presentation shall address the respondent's submitted proposal and the District's stated questions. Participation, format, and any permitted negotiation will be administered consistently with the published procurement requirements.

28	**Sharyland ISD Rights Reserved** The District reserves the right to issue written amendments or addenda, reject proposals, cancel the solicitation, and make or decline an award, as permitted by applicable law and District policy. Any waiver or clarification of a solicitation requirement shall be handled through the District's authorized procurement process and shall not be used to circumvent applicable competitive procurement requirements.

29	**Felony Conviction** If the owner/operator has ever been convicted of a felony, please enter the details of the conviction in the field provided, i.e. name, reason for conviction, date of conviction, dates and place of incarceration and probation/parole status. _____ _____ _____ *(Optional: Maximum 400 characters allowed)*

30	**Form 1295 - Certificate of Interested Parties** Pursuant HB 1295, the addition of section 2252.908 of the Government Code, all awarded vendors must fill out electronically, with the Texas Ethics Commission's online filing application. https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm The law states that a governmental entity or state may not enter into certain contracts with a business entity unless the business entity submits a disclosure of interested parties (Form 1295) to the governmental entity or state agency at the time the business entity submits the signed contract to the governmental entity or state agency. The Texas Ethics Commission has adopted rules requiring the business to file Form 1295 electronically with the Commission. This form must then be signed and attached in the Response Attachments, prior to any business transaction. Please note the following: Box 1: Please enter business entity filing form, city, state and country of the business entity's place of business. Box 2: Please enter Sharyland ISD Box 3: Please use SISD's solicitation (bid) number as the identification number being requested and the contract name as description of goods or services. Box 6: Please complete and sign and attach with bid response. A new form must be a completed upon each renewal. Please acknowledge that you have read and understand that the district may not do business with your company without the submittal of this form. ☐ I Certify *(Required: Check if applicable)*

31 **Conflict of Interest Questionnaire**

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

Does the vendor have conflict of interest with Sharyland Independent School District?

☐ Yes ☐ No

(Required: Check only one)

32 **Compliance with Anti-Trust Act**

Pursuant to Texas Government Code § 2155.005, I affirm under penalty of perjury of the laws of the State of Texas that:

1. I am duly authorized to execute this contract on my own behalf or on behalf of the company, corporation, firm, partnership or individual (Company) listed below;

2. In connection with this bid, neither I nor any representatives of the Company have violated any provision of the Texas Antitrust laws codified in Tex. Bus. & Comm. Code Chapter 15;

3. In connection with this bid, neither I nor any representative of the Company have violated any federal antitrust law; and 4. Neither I nor any representatives of the Company have directly or indirectly communicated any of the contents of this bid to a competitor of the Company or any other company, corporation, firm, partnership or individual engaged in the same line of business as the Company.

Added by Acts 1995, 74th Leg., ch. 41, Sec. 1, eff. Sept. 1, 1995.

☐ I Agree

(Required: Check if applicable)

33 **Compliance with SB 252**

SB 252 prohibits Texas governments from contracting with companies that do business with Iran, Sudan or foreign terrorist organizations; prior legislation had already prohibited state investments in companies doing business with Iran or Sudan. Does your firm do business with Iran, Sudan or foreign terrorist organizations?

☐ Yes ☐ No

(Required: Check only one)

34 **Compliance with Prohibition on Contracts with Abortion Providers SB 22**

Pursuant to Texas Government Code Chapter 2272, the District is prohibited from contracting with any abortion provider or an affiliate of an abortion provider whereby the provider or affiliate receives something of value derived from state or local tax revenue. Any contract entered into by the District is void if the prospective vendor has such a prohibited affiliation or contractual relationship. By submitting a proposal in response to the request for proposals, you are certifying to the District that you do not have such an affiliation or contractual relationship.

☐ I Certify

(Required: Check if applicable)

35 **Prohibition on Contracts with Companies Boycotting Certain Energy Companies (SB 13)**

If Contractor is a company with 10 or more full-time employees and if this Agreement has a value of at least $100,000 or more, Contractor verifies by submitting its proposal that, pursuant to Texas Government Code Chapter 2274, it does not boycott energy companies; and will not boycott energy companies during the term of the Agreement. This verification is not required for an agreement where a governmental entity determines that these requirements are inconsistent with the governmental entity's constitutional or statutory duties related to the issuance, incurrence, or management of debt obligations or the deposit, custody, management, borrowing, or investment of funds.

☐ I Certify
(Required: Check if applicable)

36 **Prohibition on Contracts with Companies that Discriminate Against Firearm and Ammunition Industries (SB 19)**

If Contractor is a company with 10 or more full-time employees and if this Agreement has a value of at least $100,000 or more, Contractor verifies by submitting its proposal that, pursuant to Texas Government Code Chapter 2274, it does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association; and will not discriminate during the term of the contract against a firearm entity or firearm trade association.

☐ I Certify
(Required: Check if applicable)

37 **Certification Regarding Texas Family Code**

As per Section 14.52 of the Texas Family Code, added by S.B. 84, Acts, 73rd Legislature, R.S. (1993), all vendors must complete and submit with the proposal the following affidavit: I, the undersigned vendor (via electronic signature), do hereby acknowledge that NO sole proprietor, partner, majority shareholder of a corporation, or an owner of 10% or more of another business entity is 30 days or more delinquent in paying child support under a court order or a written repayment agreement. I understand that under this doe, a sole proprietorship, partnership, corporation or other entity in which a sole proprietor, partner, majority shareholder or a corporation, or an owner of 10% or more of another entity is 30 days or more delinquent in paying child support under a court order or a written repayment agreement is NOT eligible to proposal or receive a state contract.

☐ Certified
(Required: Check if applicable)

38 **Federal Certifications**

Federal contract provisions and certifications shall apply to the extent required by the funding source, the nature of the services, and applicable federal law and regulations. The District will identify any additional provisions required for a federally funded agreement before execution, as applicable.

☐ I Certify
(Required: Check if applicable)

39 **Certification Regarding Debarment and Suspension**

I, the participating vendor agree to comply with the Debarment and Suspension (Executive Orders 12549 and 12689)—A contract award (see 2 CFR 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

Pursuant to this Federal Rule above, when federal funds are expended by the District, Vendor certifies that during the term of an award for all contracts by the District resulting from this procurement process, Vendor certifies that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency.

☐ I Certify
(Required: Check if applicable)

40 MINIMUM QUALIFICATIONS & ACCOUNT TEAM

Overview & Response Guidelines

Offerors must demonstrate that they meet all baseline qualifications and possess the key personnel necessary to execute the required scope of work.

Respondents shall answer each mandatory question and provide the information requested. Failure to meet a stated minimum qualification or submit a required response may result in a determination that the proposal is nonresponsive, subject to the solicitation and applicable law. The District may seek clarification only as permitted by the published procurement requirements.

41 Years in Business (Texas K-12)

State the consecutive number of years your firm has provided employee benefit consulting services to K-12 public school districts in the State of Texas.

(Required: Maximum 4000 characters allowed)

42 Texas K-12 Client Profile

State the total number of Texas public school district clients currently managed and total covered lives represented.

(Required: Maximum 4000 characters allowed)

43 Account Manager Qualifications

Detail the educational background, professional designations (e.g., CEBS, CLU), and total years of client management experience for the primary account lead who would be assigned to the District. (DO NOT INCLUDE INDIVIDUAL OR FIRM NAMES)

(Required: Maximum 4000 characters allowed)

44 Firm Independence Verification

Confirm that your firm acts as an independent consultant and is NOT owned by, operated by, or affiliated with any insurance carrier, TPA, or provider network.

☐ Yes ☐ No

(Required: Check only one)

45 **Texas Department of Insurance (TDI) & Professional Licensing**

Respondent certifies that the firm and its assigned account personnel hold all active, valid, and required licenses issued by the Texas Department of Insurance (TDI) and/or applicable Texas regulatory boards to perform employee benefit consulting and insurance advisory services in the State of Texas.

☐ Yes ☐ No

(Required: Check only one)

46 **Texas Department of Insurance (TDI) & Professional Licensing**

In the space provided below, state TDI License Type and License Number without disclosing company or personal names.

(Required: Maximum 1000 characters allowed)

47 **Subcontractor Disclosure**

State whether any portion of the consulting services will be performed by subcontractors. If yes, detail the scope of subcontractor responsibilities and qualifications without disclosing firm or personal names.

(Required: Maximum 1000 characters allowed)

48 **Litigation & Claims History (10-Year Review)**

Detail any lawsuits, pending litigation, or insurance settlement claims paid involving your firm within the last ten (10) years.

If none. Type "N/A"

(Required: Maximum 4000 characters allowed)

49 **Data security and confidentiality**

Describe your policies and controls for protecting District information, including sensitive employee or benefits data that may be accessed in performing the contract. Address access controls, secure data transfer, subcontractor access, incident reporting, retention, and secure return or destruction of District data.

Identify any security certifications, relevant contractual commitments, and additional costs. The District's final security requirements shall be established in the executed agreement and applicable attachments.

(Required: Maximum 4000 characters allowed)

50	**TECHNICAL SCOPE & SERVICE METHODOLOGY** **Offerors must demonstrate a clear understanding of the project objectives and present a thorough, effective approach to executing the required scope of work.** **Completeness: Respond directly and fully to each requirement below. Avoid generic marketing copy; provide clear, concrete operational details.** **Format: Present answers directly below each numbered prompt.**

51	**Strategic Planning & Renewal Methodology** Describe your strategy for managing annual benefit renewals and marketing processes, including rate negotiations, stop-loss placement, and provider network matching. *(Required: Maximum 4000 characters allowed)*

52	**Regulatory Compliance Support** Describe your process for assisting public school districts with legislative updates and statutory compliance (ERISA, ACA, HIPAA, TEC, TEA guidelines, and IRS rules). *(Required: Maximum 4000 characters allowed)*

53	**Open Enrollment & Communication Tools** Describe the enrollment technologies, employee communication materials, and on-site support services provided during annual open enrollment. *(Required: Maximum 4000 characters allowed)*

54 Implementation & Transition Schedule

Provide a detailed, unbranded transition plan outlining key milestones, tasks, and timelines if selected as the District's new consulting firm.

(Required: Maximum 4000 characters allowed)

55 Access to Specialized Legal & Actuarial Counsel

Describe the legal, actuarial, compliance, and other specialized advisory resources available to support the District. Identify whether these resources are employed by the respondent, retained externally, or provided through an affiliate.

Explain the type of support available, how requests are initiated, whether work product or opinions are included in the proposed fixed fee, and any additional costs. The consultant shall not represent that it provides legal advice on behalf of the District unless appropriately authorized and qualified to do so.

(Required: Maximum 1000 characters allowed)

56 PUBLIC SECTOR REFERENCES

Provide three (3) client references for similar engagements from the past five (5) years. Complete all fields for each reference:

1. **Entity Type: Client category (e.g., Commercial Employer, Health Plan, Government).**
2. **Covered Lives: Total members/subscribers managed.**
3. **Scope of Benefit Plans: Specific plans administered (e.g., Medical, PBM, Dental, Vision).**
4. **Dates of Service: Contract start and end dates (MM/YYYY – MM/YYYY or Present).**
5. **Annual Contract Value: Approximate annual value in USD.**

57 Reference 1

Texas Public Entity

(Required: Maximum 4000 characters allowed)

58 **Reference 2**

Texas Public Entity

(Required: Maximum 4000 characters allowed)

59 **Reference 3**

Texas Public Entity

(Required: Maximum 4000 characters allowed)

60 **Compensation disclosure**

The respondent shall disclose all direct and indirect compensation associated with the District's account, including consulting fees, commissions, referral fees, overrides, bonuses, contingent compensation, revenue sharing, and other financial incentives.

The respondent shall not receive undisclosed compensation in connection with the District's account.

☐ Comply ☐ Non-Comply

(Optional: Check only one)

61 **Location and accessibility**

Identify the location and functions of the offices and personnel that will support the District's account. Describe the availability of the primary account lead and backup personnel, anticipated response times, meeting availability, on-site support options, and the process for escalating urgent issues.

Identify any services performed by personnel or subcontractors outside the primary account team and any additional costs for on-site support or travel.

(Optional: Maximum 4000 characters allowed)

62	**Annual compensation reporting** The consultant shall provide an annual written compensation disclosure to the District's Purchasing Department identifying all direct and indirect compensation received or accrued from any source in connection with the District's account. The report shall identify compensation by source and type and disclose any material change in the consultant's compensation arrangements. The report shall be submitted by the date established in the executed contract. ☐ Comply ☐ Non-Comply *(Required: Check only one)*
63	**Duty to the District** The consultant shall provide objective advice in the District's interests, disclose conflicts of interest, and support informed District decision-making. Any carrier or provider negotiations shall occur only when specifically authorized in writing by the District. The District's designated representative shall have the opportunity to participate in authorized negotiations concerning its benefits programs. ☐ Comply ☐ Non-Comply *(Required: Check only one)*
64	**Cost and fees** • The anticipated agreement is a firm, fixed-fee contract, not a commission-based arrangement. Submit your fees on the line item tab.
65	**Optional Paper Copy Submission** Bidders may submit a paper copy of the questionnaire, if desired, to provide additional information, explanations, or supporting documentation for their responses. The paper copy is intended solely as a supplemental resource for the bidder’s convenience and is not required. Any paper copy submitted must exclude all identifying information, including names, logos, branding, or other details that could identify the bidder or their organization. The paper copy does not replace or fulfill the requirement to complete and submit all required questionnaire responses through Ion Wave. All mandatory Ion Wave questionnaire requirements must still be met.

66	**Signature and Declaration of Compliance** The Respondent acknowledges that it has carefully examined all instructions, requirements, specifications, and terms and conditions of this Request for Proposals (RFP) and certifies as follows: 1. Compliance with Applicable Laws The Respondent agrees to comply with all applicable federal, state, and local laws, rules, regulations, and ordinances, including the requirements and certifications expressly identified in this RFP. 2. Certification of Non-Collusion By submitting a proposal, the undersigned certifies on behalf of the Respondent that: a. The proposal has been prepared independently and submitted without collusion, consultation, communication, or agreement with any other proposer or competitor for the purpose of restricting competition. b. Neither the Respondent nor any person acting on its behalf has agreed with any competitor concerning prices, fees, pricing methods, the decision to submit or not submit a proposal, the terms of a proposal, or any other matter intended to improperly influence competition for this solicitation. c. The Respondent has not directly or indirectly disclosed the contents of its proposal, including its pricing or fees, to any competing proposer before the proposal submission deadline, except as permitted or required by law. d. The Respondent has not engaged in any conduct intended to restrain trade, rig bids, allocate markets, or otherwise unlawfully interfere with a fair and competitive procurement process. e. The undersigned is authorized to make this certification on behalf of the Respondent and understands that a materially false statement may result in rejection of the proposal, termination of an awarded contract, or other remedies available to the District under applicable law. 3. Authorization and Electronic Signature By submitting this proposal, the undersigned certifies that the statements and certifications in this section are true and correct to the best of their knowledge and is authorized to submit the proposal and contractually bind the Respondent. Please enter your first and last name. This entry will serve as the Respondent’s electronic signature and confirms that the individual submitting the proposal is authorized to contractually bind the Respondent. If you are not authorized to submit and bind the Respondent, do not submit the proposal. _____ _____ _____ *(Required: Maximum 200 characters allowed)*

67	**Bidder's Title/Position** Please type/print the title/position of the authorized company official. _____ _____ _____ *(Required: Maximum 200 characters allowed)*

Bid Lines

1 Annual Fixed Consulting Fee

Enter the total all-inclusive, annual firm fixed consulting fee for all core benefit consulting services outlined in the Scope of Work.

UOM: EA Annual Fee: $ Total: $

Supplier Notes:

☐ Additional notes *(Attach separate sheet)*

2 Special Project Rates

Partners

Provide hourly rates for optional, non-core special projects

UOM: EA Rate: $ Total: $

Supplier Notes:

☐ Additional notes *(Attach separate sheet)*

3 Special Project Rates

Managers

Provide hourly rates for optional, non-core special projects

UOM: EA Rate: $ Total: $

Supplier Notes:

☐ Additional notes *(Attach separate sheet)*

4 Special Project Rates

Administrative and Support

Provide hourly rates for optional, non-core special projects

UOM: EA Rate: $ Total: $

Supplier Notes:

☐ Additional notes *(Attach separate sheet)*

5 Special Project Rates

Other (Specify) under Notes

Provide hourly rates for optional, non-core special projects

UOM: EA Rate: $ Total: $

Supplier Notes:

☐ Additional notes *(Attach separate sheet)*

6	Special Project Rates

Per Diem Rates

UOM: EA Rate: $ Total: $

Supplier Notes:

☐ Additional notes *(Attach separate sheet)*

Supplier Information

Company Name:

Contact Name:

Address:

Phone:

Fax:

Email:

Supplier Notes

By submitting your response, you certify that you are authorized to represent and bind your company.

Print Name

Signature