



REQUEST FOR QUALIFICATIONS

RFQ NO. 26-001-11-06

**AGENT OF RECORD
THAT INCLUDES
PROPOSALS FOR EMPLOYEE HEALTH INSURANCE
AND VOLUNTARY PRODUCTS**

I. GENERAL INFORMATION:

City of San Juan (City) is seeking written proposals from qualified insurance agents to serve as the Agent of Record for insurance services, including health, dental, life, AD&D, and voluntary/supplemental insurance. This is to include providing the City of San Juan with recommendations on related products to offer our employees, providing service and maintenance of those products and related claims and education regarding benefits and associated processes and assistance to City of San Juan employees related to the group benefits, process/assist with all claims (include wellness, accidental, hospital, etc.), provide and coordinate annual health fair, coordinate open enrollment, file electronic 1095's, administer COBRA, assist with monthly billing and process new hires/term employees.

The Agent of Record Contract will be for a period of one (1) year from the day of award, with the provision to extend the contract an additional two (2) years (with one-year intervals) at the City's discretion.

The City of San Juan must receive one (1) hard copy of your submission (1) copy and one electronic PDF on a flash drive by 3:00 PM on Thursday, November 6, 2025. Proposals must be in a sealed envelope, clearly marked "**AGENT OF RECORD THAT INCLUDES PROPOSALS FOR EMPLOYEE HEALTH INSURANCE AND VOLUNTARY PRODUCTS RFQ NO. 26-001-11-06**" and should be delivered and received by mail or in person to the following address:

City of San Juan
Attention: Lori A. Maldonado, Purchasing Agent
512 S. Nebraska
San Juan, Texas 78589

Proposals should be prepared electronically, providing a straightforward, concise description of the proposer's capabilities to satisfy the requirements of the RFQ. Emphasis should be on completeness and clarity of the content. In addition, some of those responding may be placed on a short list to make a brief 5-minute presentation based on their submission to the City Commission during a City Commission meeting.

Proposals shall be firm for a period of sixty (60) days after the closing date. Each responding proposer may withdraw their proposal if it has not been accepted within sixty (60) days from the RFQ closing date.

The award of this contract will be made by the City based on the proposal which, in the City's sole and absolute judgment, will best serve the best interests and needs of the City. The City reserves the right to accept or reject any or all the proposals, and waive any informalities and irregularities in said proposals.

All proposers must provide the information requested in Section III, Proposal Submission Requirements. Failure to respond to any or all requested information may result in disqualification by the City.

Questions, interpretations, or clarification of this RFQ must be requested in writing. All questions should be directed to **Lori A. Maldonado, Purchasing Agent**. All questions are due by 4:00 pm on October 30, 2025. Please send questions to lmaldonado@sjtx.us.

II. SCHEDULE OF EVENTS/DATES:

ACTION	DATE
Issue RFQ	October 22, 2025
Final Questions Due	October 30, 2025
Proposals Due	November 6, 2025
Proposal Review	November 7, 2025
Notice of Intent to Award	November 13, 2025
Open Enrollment	3 weeks before 1/1/2026

III. PROPOSAL SUBMISSION REQUIREMENTS:

The proposing agent shall be responsible for preparing an effective, clear, and concise proposal. The proposal must include the following minimum information:

1. Cover letter addressed to Lori A. Maldonado, Purchasing Agent, and signed by a person legally authorized to bind the applicant to its proposal. The cover letter must include the name of the agency, broker, and/or agent, address, telephone and fax numbers of the agency, and email address of the person(s) who are authorized to represent the proposer. The letter should also include that the agent has made no agreements with any company that places it as the sole agent for such a company.
2. Name(s), titles, and qualifications of proposed broker(s) / agent(s) with at least 5 years of experience in municipal accounts of similar size and scope of service.
3. Name(s), titles, and qualifications of proposed key personnel with experience in municipal accounts of similar size and scope of service.
4. Articulate plan and ability to provide service delivery and support to meet the following scope of work, including examples of reports, if applicable;
 - a. Proximity to the City of San Juan.
 - b. Routine and emergent consultation relating to insurance-related issues.
 - c. Philosophy regarding addressing customer/client questions and needs.
 - d. Provide consultation in the area of insurance products and recommendations.

IV. MINIMUM QUALIFICATIONS:

1. Primary servicing agent shall reside within 20 miles of the City of San Juan.
2. Any proposer must hold a valid General Lines Life, Accident, Health, and HMO license to provide insurance services in the State of Texas.
3. Any proposer or DBA to hold a valid Certificate of Insurance for General Liability and Errors & Omissions and be listed as named insured.
4. Demonstrated experience in servicing public sector accounts of equal size, complexity, and scope.

V. SELECTION PROCESS:

1. Each proposal received will be evaluated to determine if it meets the stated requirements. Failure to meet these requirements will be cause for eliminating the proposal from further consideration.
2. The City reserves the right to reject any and all proposals, to accept or reject all parts of the proposal, and to be the sole judge of the suitability of the proposals offered.
3. Proposals will be evaluated generally on the following criteria, which are neither weighted nor prioritized:
 - a. Qualifications of the agency.
 - b. Ability to meet the scope of work and service required.
 - c. Proximity to the City.
4. All submittals in response to this RFQ are public records and available for inspection and copying upon request. Any portions of the RFQ submittal marked as confidential will not be made public without the consent of the consultant prior to the award of the contract.

VI. ADDITIONAL INSTRUCTIONS, NOTIFICATIONS, AND INFORMATION:

1. **No Gratuities** – Respondents will not offer any gratuities, favors, or anything of monetary value to any official or employee of the City of San Juan for the purpose of influencing this selection. Any attempt by a respondent to influence the selection process by any means other than disclosure of qualifications and credentials through the proper channels will be grounds for exclusion from the selection process. Accordingly, contact with members of the City Staff, who are outside of the established process, should not be initiated.
2. **All Information True** – By submitting a response, Respondents represent and warrant to the City that all information provided in the response submitted shall be true, correct, and complete. Respondents who provide false, misleading, or incomplete information, whether intentional or not, in any of the documents presented to the City of San Juan for consideration in the selection process may be excluded.

VII. CONFLICT OF INTEREST:

Bidders are advised that they must be in compliance with the following law:

Chapter 176 of the Texas Local Government Code:

Effective January 1, 2006, Chapter 176 of the Texas Local Government Code requires that any vendor or person considering doing business with a local government entity disclose in the Questionnaire Form CIQ, the vendor or person's affiliation or business relationship that might cause a conflict of interest with a local government entity. By law, this questionnaire must be filed with the records administrator of the City of San Juan no later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. See Section 176.006, Local Government Code. A Person commits an offense if the person violates Section 176.006, Local Government Code. An offense under this section is a Class C

misdemeanor.

For more information or to obtain the Questionnaire CIQ, go to the Texas Ethics Commission web page at www.ethics.state.tx.us/forms/CIQ.pdf. If you have any questions about compliance, please consult with your own legal counsel. Compliance is the individual responsibility of each person or agent of a person who is subject to the filing requirements.

VIII. TERMS AND CONDITIONS:

1. Term of Agreement: The City anticipates selecting the Agent of Record to commence services as soon as reasonably appropriate. A contract may be negotiated for a one-year period with an option to renew for an additional two years on a year-by-year basis.
2. Withdrawal of RFQ: Proposals may be withdrawn before the RFQ submittal deadline by submitting a written request to Lori A. Maldonado, Purchasing Agent. Re-submittal before the RFQ submittal deadline can be made; however, they may not be re-submitted after the deadline.
3. RFQ Costs: All costs incurred in the preparation and presentation of the RFQ shall be the responsibility of the responding party to the RFQ. All documents submitted as part of the RFQ will become the property of the City. Requests for specific material to be returned will be considered. Any material submitted that is confidential must be clearly marked as such.
4. City of San Juan Contacts: The designated individual responsible for coordination of the RFQ is Lori A. Maldonado, Purchasing Agent. Any questions relating to this RFQ should be directed to lmaldonado@sjtx.us in writing only.

IX. LITIGATION SUMMARY:

A litigation summary that briefly describes any claims or lawsuits that have been filed within the last ten (10) years against the respondent individual or firm that relates to the services performed by the respondent individual or firm must be submitted. Identify the claim or lawsuit by naming the adverse party, case number, jurisdiction where filed and current status and/or outcome of the claim or lawsuit. **If no summary is given or if a general statement is given that refers the City to inquire with a respondent individual's counsel or firm's counsel, the RFQ, RFB, RFP or CSP may be considered NON-RESPONSIVE and eliminated from consideration.** This statement may be submitted as a separate document, but must be provided at the same time that the **RFQ, RFB, RFP or CSP** is submitted.

X. JURISDICTION

Contract(s) executed as part of this solicitation shall be subject to and governed under the laws of the State of Texas. Any and all obligations and payments are due and performable and payable in Hidalgo County, Texas.

XI. VENUE

The parties agree that venue for purposes of any and all lawsuits, cause of action, arbitration, and/or any other dispute(s) shall be in Hidalgo County, Texas.