

**CITY OF MISSION  
SOLICITATION, OFFER AND AWARD FORM**

**SOLICITATION INFORMATION  
REQUEST FOR BIDS (RFB)**

<b>1. BID NO.: 19-207-05-15</b> <b>2. ISSUE DATE:</b> May 1, 2019 <b>3. FOR INFORMATION CONTACT:</b> (No collect calls) <b>NAME:</b> Crissy Cantu, Buyer <b>TELEPHONE:</b> (956) 580-8667 <b>FAX:</b> (956) 580-8798 <b>E-MAIL:</b> <a href="mailto:ccantu@missiontexas.us">ccantu@missiontexas.us</a>	<b>4. BRIEF DESCRIPTION:</b>  <p style="text-align: center;"><b>Group Term Life and AD&amp;D, Voluntary Life Insurance, Voluntary Long-Term Disability</b></p>
<b>5. PRE-BID CONFERENCE/GENERAL CONTRACTORS MEETING:</b> <i>( Highly Recommended )</i> <b>LOCATION:</b> City of Mission <b>City Hall</b> 1201 E. 8 <sup>th</sup> Street Mission, TX 78572 <b>DATE:</b> Thursday, May 08, 2019 <b>TIME:</b> 10:00 AM CST	<b>6. ADVERTISING DATES:</b> 1 <sup>st</sup> Week of Advertisement Date: __05__ / __01__ / __19__ 2 <sup>nd</sup> Week of Advertisement Date: __05__ / __08__ / __19__
<b>7. SUBMIT OFFER TO:</b>  <u>Mailing/Hand/Commercial Courier Delivery</u> <b>City of Mission</b> <b>Purchasing Department</b> 1201 E. 8 <sup>th</sup> Street R101 Mission, TX 78572 Bid # 19-207-05-15	<b>8. OFFER SUBMISSION DUE DATE AND TIME:</b>  <b>DATE:</b> May 15, 2019 <b>TIME:</b> 2:00 PM CST
<b>9. No Facsimiles or late arrivals will be accepted.</b> Any bids received after offer submission due date and time will not be opened and will be returned. City of Mission Purchasing Department time stamp clock will be the governing time for acceptability of bids. Overnight mail must also be properly labeled on the outside of the express envelope or package in reference to RFB.	
<b>10. SUBMIT WITH OFFER:</b> Original offer and 2 photocopies including documents and attachments so indicated on Page 2 of this form.	
<b>11.</b> Offers submitted in response to an RFB <u>will</u> be opened publicly by The City of Mission Purchasing Department, immediately after the submission due date and time. Offers submitted in response to an RFP will <u>NOT</u> be publicly opened.	
<b>12. FIRM OFFER PERIOD:</b> Offers submitted shall remain firm for a period of 60 calendar days from the final due date for bids.	
<b>13. NOTE:</b> For Invitation for Bids, "offer" and "offeror" mean "bid" and "bidder".	

**OFFER**  
(To be completed by Offeror)

<b>14.</b> In compliance with the above, the undersigned agrees, if this offer is accepted within the period specified in Block 12, above, to furnish any or all items, or provide the service(s), upon which prices are offered in the Schedule at the price set opposite each item or service, and to deliver the item(s) and or perform the service(s) at the designated location(s) within the time specified.	
<b>15. BIDDERS NAME, ADDRESS:</b> (Type or Print)      <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <b>TELEPHONE:</b> <b>CELL PHONE:</b> </div> <div style="width: 45%;"> <b>E-MAIL:</b> <b>FAX:</b> </div> </div>	<b>16. NAME AND TITLE OF PERSON AUTHORIZED TO SIGN THE OFFER:</b> (Type or Print)   <b>17. BIDDERS SIGNATURE &amp; DATE:</b>

**AWARD**  
(To be completed by City of Mission)

<b>18. TOTAL ESTIMATED AMOUNT OF AWARD:</b>
<b>19. PURCHASING AGENT SIGNATURE &amp; DATE OF AWARD:</b>
<div style="display: flex; justify-content: space-between;"> <div>Name: _____</div> <div>Signature: _____</div> <div>Date: ____/____/____</div> </div>

SOLICITATION INDEX				
<b>20. CONTENTS: (DOCUMENTS WITH A YES ARE TO BE SUBMITTED WITH OFFER)</b>				
	NAME	FORM DESCRIPTION	SUBMIT WITH OFFER?	
●	Cover Sheet	Solicitation, Offer and Award Form <b>(Complete in its entirety to include Sign and Date)</b>	YES	
●	Instructions to Bidders	General Terms & Conditions	YES	
●	Non-Collusive Bidding Certificate	Vendor Acknowledgement Form <b>(Signed &amp; Executed)</b>	YES	
●	Pricing Schedule	Signed and Completed <b>(Signed &amp; Executed)</b>	YES	
●	Specifications/Scope of Work	Description of Pre-Employment Drug & Alcohol Screenings and Medical Services	YES	
●	Addenda Checklist	Confirmation Receipt of Addendum(s) <b>(Signed &amp; Executed)</b>	YES	
●	Bidder's General Questionnaire	General Questions (Supporting Documentations) <b>(Signed &amp; Executed)</b>	YES	
●	CIQ Questionnaire	Conflict of Interest Questionnaire <b>(Signed &amp; Executed)</b>	YES	
<b>21. ACKNOWLEDGMENT OF ADDENDUMS:</b>		<b>ADDENDUMS #</b>	<b>DATE</b>	<b>ADDENDUMS #</b>
Offeror acknowledges receipt of the following addendum(s) to the solicitation:  (Identify addendum number and date of each.)				

**\*\*\*\*Firm name and authorized signature must appear on each page that calls For this information. Failure to do so may disqualify your Bid \*\*\*\***

# CITY of MISSION

100 YEARS AND GROWING STRONG!



City of Mission Human Resources Department  
Request for Bids 2019  
Insurance Benefits

REQUEST FOR BIDS  
(RFB)

Group Basic Term Life and AD&D  
Voluntary Life Insurance  
Voluntary Long-Term Disability

EFFECTIVE DATE: October 1, 2019

**City of Mission**  
**Instructions to Bidder – General Terms & Conditions**  
**Bid Name/No.: Group Term Life and AD&D, Voluntary Life Insurance, Voluntary Long-Term**  
**Disability / RFB: 19-207-05-15**

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**City of Mission**  
**Instructions to Bidder – General Terms & Conditions**  
**Bid Name/No.: Group Term Life and AD&D, Voluntary Life Insurance, Voluntary Long-Term Disability /**  
**RFB: 19-207-05-15**

**REQUEST FOR BID LEGAL NOTICE**

CITY OF MISSION will accept sealed bids for listed items until 2:00 p.m. local time, on May 15, 2019 C/O Eduardo Belmarez  
City of Mission Purchasing Director 1201 E 8<sup>th</sup> Street, Mission Texas, 78572.

Bids will be opened and acknowledged publicly on May 15, 2019.

This is a procurement of insurance through the competitive sealed proposal procedure outlined in the Texas Local Government Code Chapter 252, Subchapter B, Sections 252.221 (c); 252.041 (b); 252.043 (b); and 252.049 (b). At the bid opening, only the identity of the bidders will be disclosed by CITY OF MISSION. The contents of each bid will not be disclosed in order to protect the integrity of the negotiation process. To obtain the best final offer(s), revisions by short-listed candidates may be permitted after original bid submission, and before contract award. All bids will be later made available to the public for inspection after the contract is awarded. If a bidder indicates and justifies in his bid(s) that certain information is proprietary, CITY OF MISSION will not release the materials for public inspection after the contract award.

Detailed specifications, including the criteria for bid evaluations, may be obtained from:

Eduardo Belmarez, Purchasing Director

1201 E. 8<sup>th</sup> Street

Mission, TX 78572

956-580-8667

[ebelmarez@missiontexas.us](mailto:ebelmarez@missiontexas.us)

Please mark on the outside of the submitted envelope/box: "SEALED BIDS FOR CITY OF MISSION REQUEST FOR BIDS 2019 EMPLOYEE BENEFITS" 2:00 p.m. local time, May 15, 2019 and send or deliver to the attention of "City of Mission Purchasing Director".

The CITY OF MISSION reserves the right to reject any or all competitive sealed bids and waive any irregularities contained therein and to accept any competitive sealed bids deemed best and most advantageous to City of Mission. Any competitive sealed bids received after 2:00 p.m. local time, May 15, 2019, will be automatically rejected and returned to the bidder unopened.

CITY OF MISSION will not be responsible in the event that the U.S. Postal Service or any other carrier system fails to deliver the sealed bid(s) to CITY OF MISSION by the given deadline above.

**City of Mission**  
**Vendor Acknowledgment Form - Non-Collusive Bidding Certification**  
**Bid Name/No.: Group Term Life and AD&D, Voluntary Life Insurance, Voluntary Long-Term Disability /**  
**RFB: 19-207-05-15**

I/We have read instructions to bidder and specifications. My/Our bid conforms to all bid specifications, conditions, and instructions as outlined by *CITY OF MISSION*.

Signing the Acknowledgment Form confirms that our company will enter into a binding contract with CITY OF MISSION for item(s) awarded to our company. I/We have read instructions to bidder and specifications.

The undersigned Bidder, by signing and executing this bid, certifies and represents to the CITY OF MISSION that Bidder has not been offered, conferred or agreed to confer any pecuniary benefit, as defined by §1.07(a)(6) of the Texas Penal Code, or any other thing of value as consideration for the receipt of information or any special treatment or advantage relating to this bid; the Bidder also certifies and represents that Bidder has not offered, conferred or agreed to confer any pecuniary benefit or other things of value as consideration for the recipient's decision, opinion, recommendation, vote or other exercise of discretion concerning this bid; the Bidder certifies and represents that Bidder has neither coerced nor attempted to influence the exercise of discretion by any officer, trustee, agent or employee of the CITY OF MISSION concerning this bid on the basis of any consideration not authorized by law; the Bidder also certifies and represents that Bidder has not received any information not available to other bidders so as to give the undersigned a preferential advantage with respect to this bid; the Bidder further certifies and represents that Bidder has not violated any state, federal or local law, regulation or ordinance relating to bribery, improper influence, collusion or the like and that Bidder will not in the future offer, confer, or agree to confer any pecuniary benefit or other thing of value to any officer, trustee, agent or member of the CITY OF MISSION in return for the person having exercised the person's official discretion, power or duty with respect to this bid; the Bidder certifies and represents that it has not now and will not in the future offer, confer, or agree to confer a pecuniary benefit or other thing of value to any officer, trustee, agent or member of CITY OF MISSION in connection with information regarding this bid, the submission of this bid, the award of this bid or the performance, delivery or sale pursuant to this bid.

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

**Note: This form, along with the Execution of Offer, must be filled in and submitted with the sealed bid.**

**City of Mission**  
**Instructions to Bidder – General Terms & Conditions**  
**Bid Name/No.: Group Term Life and AD&D, Voluntary Life Insurance, Voluntary Long-Term Disability /**  
**RFB: 19-207-05-15**

**NOTICE TO BIDDER**

Information provided in these specifications is to be used for purposes of preparing a bid detailing costs of providing the services and insurance specified. It is further expected that each bidder will read these specifications with care, since failure to meet each condition or a combination of specified conditions may disqualify bid.

Information provided by City of Mission includes:

1. Current census \* (must request via email to [ccantu@missiontexas.us](mailto:ccantu@missiontexas.us))
2. Summary Plan documents
3. Rate history

CITY OF MISSION reserves the right to reject any or all bids or any portion thereof and to accept the bid deemed best and most advantageous to CITY OF MISSION.

Bidder is required to submit quotations on the basis of these specifications. Alternative quotations (for service on a basis different from requested in these specifications) will receive consideration if such alternatives are clearly explained. Any exceptions to coverage requested herein must be clearly noted in writing and be included as a part of the bid.

CITY OF MISSION believes that the data contained in these specifications is sufficient for preparation for a bid. The information is believed to be accurate and is based upon the latest available information, but it is not to be considered in any way as a warranty.

Requests for additional information should be directed in writing to: CITY OF MISSION, Eduardo Belmarez, Purchasing Director, 1201 E. 8<sup>th</sup> Street, Mission, TX 78572, Phone (956) 580-8667, Email address [ebelmarez@missiontexas.us](mailto:ebelmarez@missiontexas.us).

“Each vendor may propose on behalf of one (1) agent only”

The information contained in these specifications/requirements is to be used only in connection with preparing a bid for the mentioned employee benefit plans.

If any commission fees or other reimbursement arrangements are paid to any individual or organizations, they must be disclosed in the bid as to who is paid and how much. All Carriers

shall price commissions at no more than five dollars per covered employee.

Each selected provider is expected to provide a knowledgeable person to explain benefits provisions during enrollment meetings. The selected providers will also be responsible for providing enrollment materials prior to the employee benefit enrollment meetings.

All records, files and miscellaneous data necessary to administer the plan shall be and remain the property of the CITY OF MISSION.



## **GENERAL INFORMATION and INSTRUCTIONS**

1. The information contained in these specifications is confidential and is to be used only in connection with preparing a bid for the following employee benefit plans:

Group Basic Term Life and AD&D  
Voluntary Life Insurance  
Voluntary Long-Term Disability

CITY OF MISSION reserves the right to accept or reject all or any part of the bids, waive minor technicalities, and award the bid to best serve the interest of CITY OF MISSION. The CITY OF MISSION also reserves the right to waive or dispense with any of the formalities contained herein.

2. Bids are to be submitted on the basis of the specifications contained herein. Alternate bids will also be considered, if the alternatives are clearly explained. All deviations from the specifications must be clearly identified and explained.
3. The information contained herein is believed to be accurate and up-to-date, but is not intended to be an express or implied warranty.
4. No telephone or fax bids will be accepted. Bids will only be accepted if delivered by U.S. Postal Service, contract carriers, hand delivery, etc. CITY OF MISSION will not be responsible for missing, lost or late mail. Any bids received after the deadline will be returned to the bidder unopened.
5. At the bid opening, only the identity of the bidders will be disclosed by CITY OF MISSION. The contents of each bid will not be disclosed in order to protect the integrity of the follow-up negotiation process with short-listed candidates.
6. To obtain the best final offer(s), revisions by short-listed candidates may be permitted after original bid submission, and before contract award.
7. All bids will later be made available to the public for inspection after the contract is awarded. If a bidder indicates and justifies in his bid(s) that certain information in the bid(s) is confidential or a trade secret, CITY OF MISSION will allow or not allow the disclosure of requested information in accordance with the Texas Open Records Act.
8. Vendors are cordially invited to the bid opening, but are not required to attend.

### **TIMETABLE**

1. These specifications are to be released for action at 10:00 am Wednesday, May 1, 2019.
2. One (1) original and two (2) copies of the bids are to be delivered or mailed to City of Mission, C/O Eduardo Belmarez, Purchasing Director, 1201 E 8<sup>th</sup> Street, Mission Texas, 78572 to arrive by 2 PM Wednesday, May 15, 2019.
3. Consideration and action on the Bids will be presented to the City Council on or about June 10, 2019.
4. The successful bidder will be notified after the selection has been approved by City Council.
5. Coverage is to be effective October 1, 2019 and extend through September 30, 2020.
6. Policies or contracts are to be provided to CITY OF MISSION no later than 30 days after such effective date.
7. The contract term desired is one (1) year with two (2) one-year renewals subject to City Council approval.

### **PREPARATION OF BID**

The bidder shall prepare their bid in one (1) original and two (2) copies with attachments as necessary to fulfill the specifications contained herein. Unless otherwise stated, all blank spaces on the bid are applicable to the subject specification, or must be correctly filled. A unit price must be stated for each item, either typed in or written in ink. Any exceptions or deviations from the requested services must be clearly indicated in writing and submitted with and form a part of the bid form. Failure to follow these instructions will be grounds for disqualifications of a bid.

Complete and sign all documents provided including the Conflict of Interest Questionnaire (CIQ) which is included in the information you have received.

### **WITHDRAWAL OF BID**

Bidders may withdraw their bid anytime up to the time specified as the closing time for acceptance of bids. However, no bidder shall withdraw or cancel their bid for a period of 60 days after said closing date for acceptance of bid nor shall the successful bidder withdraw or cancel or modify their bid, except at the request of CITY OF MISSION, after having been notified that CITY OF MISSION has accepted the said bid. Withdrawal or cancellation of a bid after the closing date for acceptance of bids shall result in the forfeiture of the bid security.

## **CRITERIA USED IN EVALUATING BIDS**

1. No insurance bids will be accepted from insurers without a Best's Rating, of at least an "A-" in the most recent edition of BEST'S KEY RATING GUIDE.
2. Any insurers shall be duly licensed by the state of Texas, and comply with all applicable state insurance laws and requirements or duly constituted applicable insurance regulatory authorities. A local government self-insurance pool organized under the Texas Interlocal Cooperation Act or other state law shall also be an acceptable provider.
3. The bid must be in easily understood format with coverage clearly outlined.
4. Evaluation and Basis for Award

### **(A) Award of Contract**

- (a) If the competitive sealed bidding requirement applies to the contract for goods or services, the contract must be awarded to the lowest responsible bidder or to the bidder who provides goods or services at the best value for the municipality.
- (b) In determining the best value for the municipality, the municipality may consider:
  - 1) the purchase price;
  - 2) the reputation of the bidder and of the bidder's goods or services;
  - 3) the quality of the bidder's goods or services;
  - 4) the extent to which the goods or services meet the municipality's needs;
  - 5) the bidder's past relationship with the municipality;
  - 6) the impact on the ability of the municipality to comply with laws and rules relating to contracting with historically underutilized businesses and nonprofit organizations employing persons with disabilities;
  - 7) the total long-term cost to the municipality to acquire the bidder's goods or services; and
  - 8) any relevant criteria specifically listed in the request for bids or proposals

### **(B) One Award**

One contract award will be made under this Request for Bids. Multiple contract awards shall not be made.

## QUALIFICATION OF COMPANIES SUBMITTING BIDS

All companies submitting bids must be licensed by the state of Texas and have demonstrated level of good performance with municipalities, school City or other public entities in Texas. The company must have an Errors and Omissions (E&O) policy with a minimum limit of \$1,000,000.

Any company submitting a bid must maintain a fully staffed office for the servicing of the plan. The company must have been in business for at least five (5) years and must assign a minimum of one (1) qualified account representative to service CITY OF MISSION to include assisting with enrollment responsibilities. The selected vendor must provide a minimum of three (3) qualified enrollers for the City's open enrollment period. The selected vendor must commit to at least 10 working days for enrollments August 5 – 16th. This representative must have a minimum of five (5) years' experience in employee benefits, or hold the CLU, CEBS and or RHU designation.

## DEVIATION FROM SPECIFIED COVERAGE OR SERVICE

Bids are to be submitted on the basis of the specifications contained herein. Bidder **MUST** include the RFB Submission Forms with its bid. All costs to be incurred and billed to CITY OF MISSION will be firm and included in these forms. Alternative bids will also be considered, provided the alternatives are clearly explained. All deviations from the specifications must be clearly identified and explained.

## UNDERWRITING DATA

CITY OF MISSION has assembled the underwriting exposure, and loss data included in these specifications. While every effort has been made to ensure the accuracy of this information, it cannot be guaranteed. It shall be the responsibility of the successful bidder to review this information and work with CITY OF MISSION on an ongoing basis to ensure all relevant exposures are included in CITY OF MISSION's plan.

If it becomes necessary to revise any part of this bid, a written addendum will be provided to-all bidders who have submitted an "Intent to Bid Form". CITY OF MISSION is not bound by any oral representation, classifications, or changes made in the written specifications by CITY OF MISSION employees, unless such classification or change is provided to bidders in a written addendum from an authorized representative of CITY OF MISSION.

## PRE-BID MEETING FOR INTERESTED VENDORS

A Pre-bid meeting will be conducted at the City of Mission City Hall, 1201 E 8<sup>th</sup> Street, Mission Texas, 78572 at 10:00 am May 8, 2019. Please submit any questions you have to Eduardo Belmarez at [ebelmarez@missiontexas.us](mailto:ebelmarez@missiontexas.us) by 5:00 pm May 6, 2019. Individual vendors are not required to attend the meeting. All questions submitted will be provided to all vendors as soon as possible after May 9, 2019. No additional questions will be accepted after May 9, 2019.

## COMPLIANCE WITH LAWS

All bidders involved shall observe and comply with all regulations, laws ordinances, etc., of local, state, and federal government as they apply to this bid process.

## TERM OF CONTRACT AND EXTENSION/RENEWAL RIGHTS

The term of the contract for insurances or service shall be for not less than one (1) year, subject to earlier termination as provided by the law and by the terms of the contract. In addition, unless otherwise specified in the bid, the award of this bid shall include the right at the option of CITY OF MISSION, and contingent upon the agreement by both parties, to any change in premium costs or benefits to renew and extend this contract on a year to year basis as may be permitted by applicable law and City approval as may be in the best interest of CITY OF MISSION; if the maximum term of this contract and all renewals of it shall be not more than three (3) years before such contract must again be offered for competitive bidding.

## AUTHORIZED SIGNATURE

All bid forms must be signed by persons who have legal authority to bind the insurer and administrator to the services proposed.

## DISQUALIFICATION AND REJECTION OF BIDS

Failure to comply with the requirements or the procedures set forth herein, or to satisfy the insurance and servicing criteria as set forth in the specifications, may result in disqualification. It is not intended that exceptions to the specification will, in and of themselves, result in disqualification.

## CONTINUITY OF COVERAGE

All employees and dependents covered by the current plan are to receive immediate coverage under the new plan. Continuity of coverage for current participants is to be on a "no loss no gain" basis for all insurance coverage. In addition, bidders must waive the actively at-work provisions.

Bidders are advised that they must be in compliance with the below mentioned 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 Mission not later than the 7th business day after the date the person becomes aware of facts that require the statement 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 Questionnaire CIQ go to the Texas Ethics Commission web page at [www.ethics.state.tx.us/forms/CIQ.pdf](http://www.ethics.state.tx.us/forms/CIQ.pdf).

**IF YOU HAVE ANY QUESTIONS ABOUT COMPLIANCE, PLEASE CONSULT YOUR OWN LEGAL COUNSEL. COMPLIANCE IS THE INDIVIDUAL RESPONSIBILITY OF EACH PERSON OR AGENT OF A PERSON WHO IS SUBJECT TO THE FILING REQUIREMENT. AN OFFENSE UNDER CHAPTER 176 IS A CLASS "C" MISDEMEANOR.**

## **Disclosure of Interested Parties**

Contractor is to comply with Government Code Section 2252.908 enacted by H.B. 1295, which prohibits a government entity or state agency from entering into certain contracts with a business entity unless the business entity submits a disclosure of interested parties. For more information go to the Texas Ethics Commission web page at: [https://www.ethics.state.tx.us/whatsnew/elf\\_info\\_form1295.htm](https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm)

## **Appeal Process**

An appeal may be brought by the lowest bidder deemed to have been non-responsive and/or not responsible. Appeals are limited to the following:

1. Matters of bias, discrimination, or conflict of interest
2. Computing errors and alleged improprieties or ambiguities in bid specifications; and
3. Non-compliance with procedures described in solicitation or City Policy.

The appeal must be in writing and shall be filed with the Purchasing Director at:

Eduardo Belmarez, Purchasing Director  
City of Mission  
1201 E. 8<sup>th</sup> Street, Room R-101  
Mission, Texas 78572

Appeals must include the following information:

- a. Name, address, email, telephone and fax number of appellant;
- b. Bid identification number;
- c. A detailed description of the legal and factual basis of the appeal (include any and all relevant documents, diagrams, photos, etc.);
- d. The desired outcome/solution;
- e. Signed and dated

All appeals must be filed within three (3) working days from the date of award by City Council. Untimely appeals will not be considered. Upon receipt of the appeal, the Purchasing Director will have three (3) working days to attempt to clarify or resolve any issues addressed in the request for appeal.

If the appeal is not resolved with the Purchasing Director, then it shall be considered at a public hearing at the next City Council meeting. All determinations made by the City Council are final.

### **Background Information**

CITY OF MISSION is located in Mission, Texas. The City has current enrollment of approximately 685 full-time employees.

The basic group term life insurance amount is \$10,000 per employee and includes \$10,000 accidental death and dismemberment. A copy of the plan of benefits is included on the City of Mission Website.



**City of Mission**  
**Instructions to Bidder – General Terms & Conditions**  
**Bid Name/No.: Group Term Life and AD&D, Voluntary Life Insurance, Voluntary Long-Term Disability / RFB:**  
**19-207-05-15**

**AGENT INFORMATION**

To be completed if agent services are to be used by insurance company or service provider (please provide agent information where it applies).

1. Copy of Agent's E&O Insurance Certificate.
2. Copy of Agent's Insurance License.
3. Name and mailing address for Agent.
4. Agent's relationship with insurance company or service provider (length of time, number of groups, number of employee lives).
5. Agent services to be provided.
6. Agent experience in life insurance industry.
7. Agent commission included in your premium.

Agent Commission: % of premium \_\_\_\_\_ Agent Commission: Amount \_\_\_\_\_

8. Please provide a reference list we may contact.

City of Mission  
Pricing Schedule

Bid Name/No.: Group Term Life and AD&D, Voluntary Life Insurance, Voluntary Long-Term Disability / RFB:  
19-207-05-15

**Life Insurance  
2019-2020**

City of Mission	Vendor Name		
Plan Option:	Quote	Life Benefit Reduction	
		AGE Bracket	Reduction %
Plan Year:	2019-2020		
Insurance Company:			
Admin. Contract Guarantee			
Participating Lives / # of Employees:	685		
Group Term Life & AD&D		Voluntary Life Rates	
Amount of Coverage: \$10,000		AGE Bracket	Rate
Life Per Covered Volume: (\$1,000)			
Monthly Basic Life Rate:			
AD&D Per Covered Volume (\$1,000):			
Monthly Basic AD&D Rates:			
Total Monthly Premiums:			
<b>Annual Premium:</b>	<b>\$0.00</b>		
<b>Agent/ Broker Fees:</b>			
<b>Voluntary Life:</b>			
Guarantee Issue:			
Voluntary Life participation:			
Voluntary Coverage EE:			
Voluntary Coverage SP:			
Voluntary Coverage CH:			
Voluntary LTD		LTD Benefit Reduction	
Benefit Percentage:		AGE Bracket	Rate
Maximum Monthly Benefit:			
Minimum Monthly Benefit:			
Elimination Period:			

<b>City of Mission</b>			
<b>Contract Questions:</b>			
<b>Does quote include accelerated death benefit for terminal illness?</b>			
<b>Does quote include "Portability"?</b>			
<b>Does quote include "Convertability"?</b>			
<b>Does quote include waiver of premiums?</b>			
<b>Does quote include "Continuation"?</b>			
<b>Maximum Working hours:</b>			
<b>Value added Benefits:</b>			

City of Mission

Bid Name/No.: Group Term Life and AD&D, Voluntary Life Insurance, Voluntary Long-Term Disability / RFB:  
19-207-05-15

GROUP BASIC TERM LIFE

1. Bids are desired for a Group Basic Term Life Insurance policy provided to each full-time employee of the CITY OF MISSION and a guaranteed issue policy with minimum participation requirements. Coverage of \$10,000 per employee with \$10,000 Accidental Death and Dismemberment is required with no age reductions.
2. Renewal rates must be received by the City of Mission at least 90 Days prior to the renewal date.
3. The Insurance Company must have an A.M. Best Rating of "A-" or better.
4. Effective date is to be October 1, 2019.

**QUESTIONS:**

1. Describe organization submitting proposal.
  - a) Insurance Company Name: \_\_\_\_\_
  - b) Address: \_\_\_\_\_
  - c) Contact Person: \_\_\_\_\_
  - d) Telephone Number: \_\_\_\_\_
  - e) Year Founded: \_\_\_\_\_
2. What is current A.M. Best rating for your company? \_\_\_\_\_

3. Provide three Texas client references

<u>Name of Client</u>	<u>Contact Person</u>	<u>Telephone Number</u>	<u># of Employees</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

4. Describe Claim Payment Services:
  - a) Where will claims be paid? \_\_\_\_\_
  - b) What is normal claim processing time? \_\_\_\_\_
  - c) Are interest credits paid to beneficiary from date of death to date of benefit payment?  
Yes\_\_\_\_ No\_\_\_\_

5. Does quote include waiver of premium benefit? Yes\_\_\_\_ No\_\_\_\_  
If so, please describe: \_\_\_\_\_  
\_\_\_\_\_

6. Does quote include accelerated death benefit for terminal illness? Yes\_\_\_\_ No\_\_\_\_  
If so, please describe: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
7. Does quote include "Portability" to allow payment of premium at group rates following employment termination? Yes\_\_\_\_ No\_\_\_\_  
If so, please describe: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
8. Does quote include "Convertability" to allow payment of premium at group rates following employment termination? Yes\_\_\_\_ No\_\_\_\_  
If so, please describe: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
9. Describe "guarantee issue" underwriting guidelines:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
10. Describe initial enrollment procedures (Include sample of education materials):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
11. Will a Master Contract be issued to the City of Mission? Yes\_\_\_\_ No\_\_\_\_  
If so, please provide specimen contract.  
Policy holder & enrollment services to be provided: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
12. For what period of time are quoted rates guaranteed? \_\_\_\_\_
13. Is a longer rate guarantee available? Yes\_\_\_\_ No\_\_\_\_  
If so, please describe: \_\_\_\_\_

**CITY OF MISSION  
ADDENDA CHECKLIST**

**Bid Name/No.: Group Term Life and AD&D, Voluntary Life Insurance, Voluntary Long-Term Disability / RFB:  
19-207-05-15**

**Bid of:** \_\_\_\_\_  
(Bidder Company Name)

**To:** City of Mission

**Ref.: "Employee Insurance Benefits":19-207-05-15**

Ladies and Gentlemen:

The undersigned Bidder hereby acknowledges receipt of the following Addenda to the captioned RFB (initial if applicable).

No. 1 \_\_\_\_ No. 2 \_\_\_\_ No. 3 \_\_\_\_ No. 4 \_\_\_\_ No. 5 \_\_\_\_

Respectfully submitted,

**Bidder:** \_\_\_\_\_

**By:** \_\_\_\_\_

(Authorized Signature for Bidder)

**Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**GENERAL BUSINESS QUESTIONNAIRE**  
**(SUPPLIES, SERVICES AND CONSTRUCTION)**

This questionnaire, the requested list of references and the authorization to release financial information are used in part to assist in determining a potential contractor's responsibility. Offerors shall submit the General Business Questionnaire information within two (2) work days from the date of notification by the City, or with the offer, if so indicated in the Table of Contents page 2 of the Solicitation, Offer and Award Form. All information must be current and traceable. Each venturer of a joint venture must submit a separate signed form.

City of Mission reserves the right to make additional inquiries based on information submitted, or the lack thereof. Questions concerning this questionnaire or the authorization form should be directed to the contact person identified on the Solicitation, Offer and Award Form. In cases where a question does not apply or if unable to respond, offeror should refer to the item number, repeat the question, and indicate N/A (Not Applicable) or N/R (No Response), as appropriate. Offeror will explain the reason when responding N/A or N/R.

1. Name of Offeror ("Business"): \_\_\_\_\_
2. List name(s) and business address of officers and directors for corporations, partners for partnerships, and venturers for joint ventures (attach additional pages as necessary).  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
3. Number of years in business under present business name: \_\_\_\_\_
4. If applicable, list all other names under which the Business identified above operated in the last 5 years.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
5. Annual Gross Revenue (Past year): (M represents millions, K represents thousands)  
☐ \$100K or less    ☐ \$100K-\$500K    ☐ \$500K-\$1M    ☐ \$1M-\$5M    ☐ \$5M-\$10M  
☐ \$10M-\$16M    ☐ \$16M or Over
6. Will bidder/proposer provide a copy of its financial statements for the past two (2) years, if requested by City of Mission? ☐ Yes ☐ No
7. Number of current employees: \_\_\_\_\_
8. Has the Business, or any officer or partner thereof, failed to complete a contract? ☐ Yes ☐ No
9. Is any litigation pending against the Business? ☐ Yes ☐ No
10. Is offeror currently for sale or involved in any transaction to expand or to become acquired by another business entity? If yes, offeror needs to explain the expected impact, both in organizational and directional terms. ☐ Yes ☐ No  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

11. Has the Business ever been declared "not responsible" for the purpose of any governmental agency contract award? ☐Yes ☐No
12. Has the Business been debarred, suspended, proposed for debarment, declared ineligible, voluntarily excluded, or otherwise disqualified from bidding, proposing, or contracting? ☐Yes ☐No
13. Are there any proceedings pending relating to the Business' responsibility, debarment, suspension, voluntary exclusion, or qualification to receive a public contract? ☐Yes ☐No
14. Has the government or other public entity requested or required enforcement of any of its rights under a surety agreement on the basis of a default or in lieu of declaring the Business in default? ☐Yes ☐No
15. Is the Business in arrears on any contract or debt? ☐Yes ☐No
16. Has the Business been a defaulter, as a principal, surety, or otherwise? ☐Yes ☐No
17. Have liquidated damages or penalty provisions been assessed against the Business for failure to complete work on time or for any other reason? ☐Yes ☐No
18. Does offeror have a contingency plan or disaster recovery plan in the event of a disaster? If so, then Bidder will provide a copy of the plan. ☐Yes ☐No
19. Does offeror have quality assurance program? If yes, offeror will describe its quality assurance program, its quality requirements, and how they are measured. ☐Yes ☐No
20. If a "yes" response is given under questions 9 through 19, please provide a detailed explanation including dates, reference to contract information, contacts, etc. (attach additional pages as necessary).

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I, individually and on behalf of the business named in this Business Questionnaire, do by my signature below, certify that the information provided in this questionnaire is true and correct. I understand that any false statements or misrepresentations regarding the Business named above may result in: 1) termination of any or all contracts which City of Mission has or may have with the Business; 2) disqualification of the Business from consideration for contracts; 3) removal of the Business from City of Mission's vendors' list; or/and 4) legal action(s) applicable under federal, state, or local law.

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(Owner, CEO, President, Majority Stockholder or Designated Representative)



## LIST OF REFERENCES FOR SIMILAR PROJECTS

Use additional pages as necessary.

1. Project:  
Date of Completion (if applicable):  
Contact Person:  
Company Name:  
Address:  
Telephone Number:  
Fax Number:  
E-mail Address:
  
2. Project:  
Date of Completion (if applicable):  
Contact Person:  
Company Name:  
Address:  
Telephone Number:  
Fax Number:  
E-mail Address:
  
3. Project:  
Date of Completion (if applicable):  
Contact Person:  
Company Name:  
Address:  
Telephone Number:  
Fax Number:  
E-mail Address:
  
4. Project:  
Date of Completion (if applicable):  
Contact Person:  
Company Name:  
Address:  
Telephone Number:  
Fax Number:  
E-mail Address:

# CONFLICT OF INTEREST QUESTIONNAIRE

## FORM CIQ

For vendor doing business with local governmental entity

**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.

### OFFICE USE ONLY

Date Received

**1 Name of vendor who has a business relationship with local governmental entity.**

**2** ☐ **Check this box if you are filing an update to a previously filed questionnaire.** (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

**3 Name of local government officer about whom the information is being disclosed.**

\_\_\_\_\_  
Name of Officer

**4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.**

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐ Yes

☐ No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐ Yes

☐ No

**5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.**

**6** ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

**7**

\_\_\_\_\_  
Signature of vendor doing business with the governmental entity

\_\_\_\_\_  
Date

## **CONFLICT OF INTEREST QUESTIONNAIRE**

### **For vendor doing business with local governmental entity**

A complete copy of Chapter 176 of the Local Government Code may be found at <http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm>. For easy reference, below are some of the sections cited on this form.

**Local Government Code § 176.001(1-a):** "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

- (A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;
- (B) a transaction conducted at a price and subject to terms available to the public; or
- (C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

**Local Government Code § 176.003(a)(2)(A) and (B):**

- (a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

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- (2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that

(i) a contract between the local governmental entity and vendor has been executed;  
or

(ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than \$100 in the 12-month period preceding the date the officer becomes aware that:

- (i) a contract between the local governmental entity and vendor has been executed; or
- (ii) the local governmental entity is considering entering into a contract with the vendor.

**Local Government Code § 176.006(a) and (a-1)**

- (a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

(1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of that local governmental entity.

- (a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

- (1) the date that the vendor:

(A) begins discussions or negotiations to enter into a contract with the local governmental entity; or

(B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

- (2) the date the vendor becomes aware:

(A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);

(B) that the vendor has given one or more gifts described by Subsection (a); or

(C) of a family relationship with a local government officer.