

WORKFORCESOLUTIONS

G R E A T E R D A L L A S

April 8, 2021

Interested Respondents

Request for Information (RFI)

Multiple Brokers (Healthcare Insurance for a Small Group, Risk Management Insurance and Real Estate Leasing)

Workforce Solutions Greater Dallas (WFSDallas) is a non-profit organization that administers and acts as fiscal agent for programs consolidated at the local level and is responsible and accountable for the management of all workforce development funds made available to the local workforce development area. The WFSDallas administers contracts and activities with a budget of approximately \$140M annually. The WFSDallas is a tax exempt organization. Please see the WFSDallas website (www.wfsdallas.com) to learn more about workforce programs, Board of Directors and other pertinent information.

Services Solicited

Services solicited in this Request for Information (RFI) include:

**Healthcare Insurance for a Small Group,
Risk Management Insurance, and
Real Estate Leasing**

Descriptions are provided below in the “**Services for Response by Potential Respondents**” in this RFI.

Administration of This Request for Information (RFI)

The RFI is issued **at 1:00 p.m. CDT, Thursday, April 8, 2021** and available to download from the Board’s website: <http://www.wfsdallas.com/doing-business>. If you are unable to download the RFI, please contact: procurement@wfsdallas.com or (214) 290-1000.

The package contains all the necessary information and forms to respond to in this Request for Information (RFI). A response to this RFI must include all items listed in “**Response Checklist and Order of Submission of the Services for Response by Potential Respondents section**” of this RFI.

Proposals must be typed, single spaced, 12 font, one sided only, one column, and submitted on 8 ½ x 11 inch paper in accordance with the instructions provided. **Fancy or bulky binding, colored displays, and promotional material are discouraged.** Emphasis must be placed on addressing all the requirements of this RFI in a clear and concise manner. The RFI will be available on our website: <http://www.wfsdallas.com/doing-business>

Proposals must be officially received by WFSDallas staff to: procurement@wfsdallas.com no later than **5 p.m. CDT on Thursday, April 29, 2021**. **Any proposals or amendments received or post marked after the April 29, 2021 deadline will not be considered, but will be deemed late and non-responsive to this RFI procurement process. Late proposals or amendments will be returned without review.**

Workforce Solutions Greater Dallas is an equal opportunity employer/program. Auxilliary aids are available upon request, for persons with disabilities. TTY:214-745-1054. Funding received by the TWC and through the Department of Labor, Health, Education and Agriculture. WFSDallas is a proud partner of the American Job Center Network. Nearly 100% of paid costs would be from Federal Funds. It is not anticipated that non-governmental funds will be involved.

achieving competitive solutions... for employers through quality people and for people through quality jobs.

All proposals received by the deadline will be presented for action (recommended or not recommended) at the WFSDallas Board of Directors' meeting in May 2021.

Dated Material: All proposals are due by 5:00 p.m. CDT on April 29, 2021. WFSDallas is not responsible for any technology issues. No faxed proposal will be accepted.

Bidders' Conference

There will be no Bidders' Conference to respond to questions on the RFI; however, respondents may pose any questions to the e-mail link at: procurement@wfsdallas.com by **5:00 p.m. on Thursday, April 15, 2021, CDT**. A formal question/answer, clarifications or amendments will be posted at the Board's website: <http://www.wfsdallas.com/doing-business> **by close of business on April 19th.**

Funding

No WFSDallas funding is available under this RFI. It is intended that the brokers selected will receive a fee for its brokerage services based on the amount of healthcare insurance for a small group, risk management insurance and real estate leasing services signed by the WFSDallas. The broker's fee will be paid by the companies offering services to the WFSDallas.

Letter of Authorization/Services Period

The letter of authorization as a result of this RFI **will commence not later than June 1, 2021**. The WFSDallas may vary the time frame and/or extend the authorization period, contingent on satisfactory performance in accordance with Texas Workforce Commission and WFSDallas requirements for up to three additional one year terms. The total terms of a letter of authorization to provide services shall not exceed four (4) years. The WFSDallas reserves the right to terminate the letter of authorization annually or earlier based on provider performance and compliance with letter of authorization terms and conditions.

Eligible Respondents

Proprietorships or organizations licensed in the State of Texas with the capability to provide services described within this RFI and with the professional experience, a record of integrity and good business ethics (i.e., not debarred from doing business with state, federal or local government), are invited to respond.

Governing Provisions and Limitations

1. The main purpose of this RFI is to ensure uniform information in the solicitation of proposals and procurement. This RFI does not commit the WFSDallas to pay for costs incurred in the preparation of a response, or any other costs incurred prior to the execution of a formal agreement, unless such costs are specifically authorized in writing by the WFSDallas.
2. WFSDallas reserves the right to accept or reject any or all proposals received, to cancel and/or reissue this RFI in part or its entirety.
3. WFSDallas reserves the right to correct any error(s) and/or make changes to this solicitation as it deems necessary.
4. All Board Directors, officers, and staff, or any agents of the Board are precluded from entertaining questions concerning the proposal or this procurement process outside the confines of the formal Questions and Answers process. Potential respondents, respondents and current provider of services are asked to respect these conditions by not making personal requests for assistance. No employee, member of a Board of Directors or other governing body, or representative of a respondent who submits a proposal under this RFI may have any contact outside of the formal review process with any employee of WFSDallas, or any member of the Board of Directors for purposes of discussing or lobbying on behalf of respondent's proposal. This contact includes written correspondence, telephone calls, personal

meetings, e-mail messages, or other kinds of personal contact. WFSDallas will reject proposals of those respondents who violate this condition.

5. WFSDallas reserves the right to contact any individual, agency employer, or grantees listed in a proposal, to contact others who may have experience and/or knowledge of the respondent's relevant performance and/or qualifications; and to request additional information from any and all respondents.
6. **Respondents shall not under penalty of law, offer or provide any gratuities, favors, or anything of monetary value to any officer, member, employee, or agent of the Board, for the purpose of having an influencing effect toward their own proposal or any other proposal submitted hereunder.**
7. **No Board Director, officer, or employee, or any agent of the Board shall participate in the selection, award or administration of a contract supported by Board funds if a conflict of interest, real or apparent, would be involved.**
8. **Respondents shall not engage in any activity, which will restrict or eliminate completion.** Violation of this provision may cause a respondent to be disqualified.
9. WFSDallas reserves the right to deem a proposal non-responsive or disqualify any proposal that, in its sole determination, does not comply with or conform to the terms, conditions, and/or requirements of this RFI.
10. **Public Disclosure of Proposal Information** - this is a negotiated procurement utilizing the request for proposal method, and as such, the selection and award of a contract does not have to be made to the respondent(s) submitting the lowest priced offer, but rather to the respondent(s) submitting the most responsive proposal that satisfies the Board's requirements and is determined to be in the best interest of the Board.

Workforce Solutions Greater Dallas is a State of Texas appointed Local Workforce Development Board. Proposals submitted will not be returned and are subject to the Texas Public Information Act located in Chapter 552 of the Texas Government Code (the "PIA") and may be disclosed to the public upon request. Subject to the PIA, proposers may protect trade secret, proprietary and confidential information from public release. If a proposer does not desire proprietary or confidential information in its proposal to be disclosed, proposer is required to identify all proprietary or confidential information in its proposal. This identification must be done by individually marking each page with the words "Confidential Information" on which such proprietary or confidential information is found. If the proposer fails to identify confidential information, proposer agrees that, by submission of its proposal, those sections shall be deemed non-confidential and made available in response to any public request.

Proposers are advised that Workforce Solutions Greater Dallas, to the extent permitted by law, will protect the confidentiality of submitted proposals. However, proposers shall consider the implications of the PIA, particularly after the request for proposals process has ceased and the contract award has occurred. While provisions in the PIA may apply to protect confidential information, proposers are further advised that a determination on whether those standards have been met will not be made by Workforce Solutions Greater Dallas, but must be decided by the Office of the Attorney General of the State of Texas. In the event a request for public information is made, Workforce Solutions Greater Dallas will notify the proposer and the proposer may then request an opinion from the Attorney General pursuant to Section 552.305 of the Texas Government Code. Workforce Solutions Greater Dallas will not make a request for an opinion from the Texas Attorney General. Copyrighted proposals are unacceptable and are subject to disqualification as non-responsive.

Proposal Evaluation Process

WFSDallas assigns professional staff to read and evaluate each proposal. Parts of the scoring are scored independently by each reader; the final scores for those parts will be the average of the independent scores of all

readers. In selecting proposal for letter of authorization/agreement, WFSDallas reserves the right to depart from the strict ranking by evaluation scores, whenever it deems such departure will better serve the best interests of WFSDallas and its constituents.

Proposer Inquiry and Appeal Process

1. The Dallas County Local Workforce Development Board, Inc. dba Workforce Solutions Greater Dallas is the responsible authority for handling complaints or protests regarding the procurement and proposal selection process. Please see the TWC Financial Manual for Grants and Contracts, Chapter 14, Procurement, and Appendix D, September 1, 2020. <https://twc.texas.gov/financial-manual-grants-contracts-chapter-14-procurement>

2. Respondents not selected by this process may appeal the decision by submitting, within 10 days of the Board notification of the procurement decision, a written request for debriefing to obtain information on the procurement process and how their proposal or offer was received and ranked. The Board shall acknowledge receipt of the Request for Debriefing in writing within 10 days of receipt, along with the date and time of the scheduled briefing. (NOTE: The Board extends the courtesy of offering a briefing to any respondent who is not selected for funding; the 10-day time frame must be adhered to only if a respondent is considering an appeal.) A copy of the complete appeal process will be provided upon request.

Services for Responses by Potential Respondents

Respondents to the RFI must submit **a separate proposal** for any of the services requested below. A **separate proposal** for services will consist of the information requested in the **Response Checklist and Order of Submission** for the respective service. Please note that the cover sheet and exhibit information are provided hereto the RFI as Attachment A and Exhibits A – D, respectively. A response to this RFI does not commit the WFSDallas to sign a brokerage agreement.

A. Healthcare Insurance for a Small Group

WFSDallas is seeking information for qualified, experienced and recognized insurance brokers to represent the WFSDallas in healthcare insurance (i.e. medical, dental and life). Services may include, but are not limited to the following:

- Develop a chart of recommended insurance coverages based on current information supplied in 2020 and 2021 Health Insurance Plans (please see Exhibit A in this RFI). Prospective brokers should offer comparable or improved insurance coverage for similar or lesser premiums. We currently have twenty-six (26) employees receiving healthcare insurance. We have provided general employee information in the table below:

Total Number of Employees – 26

Gender	Age Range of Employees	Number of Dependents of Employees
17 Females	34 to 73	21
9 Males		

- Obtain medical, dental and life insurance quotations from recognized healthcare insurance companies.
- Periodically update WFSDallas on changes in the insurance industry and recommendations.

Evaluation Criteria/Point Value for Evaluation Criteria

Selection of a broker will be based on broker’s demonstrated competence in providing the services solicited, qualifications, experience and quality of proposed insurance coverage.

Following is the point value for the evaluation criteria:

Broker's Demonstrated Competence (New Brokers) or (Current Broker) 50

The respondent will demonstrate history of organization providing services, qualifications and experience, and licenses (if applicable) as referenced in this RFI. The respondent will note years of experience as broker for services on behalf of small businesses and non-profit organizations.

Quality of Proposed Insurance Coverage 50

The respondent will describe services that will include, but are not limited to, types of coverages that are requested in the RFI that respondent will recommend for the WFSDallas. The respondent will also describe all innovations or industry standards not presently covered.

Total Possible Points for Proposal Response 100

Response Checklist and Order of Submission

The proposal must be submitted in the following order:

Proposal Cover Sheet (Attachment A)

All items on the Proposal Cover Sheet must be completed. Identify a liaison or primary contact person, as well as the Signatory Authority – a person with the legal authority to negotiate and sign an agreement on behalf of the proposing entity. (This is also the person who must sign the required certification forms upon approval to provide the brokerage service.)

Proposal Narrative

The respondent will include demonstrative history of organization providing services, qualifications and experience, and licenses (if applicable) as referenced in this RFI. Please also note any years of experience as broker for services on behalf of small businesses and non-profit organizations. In addition, the respondent will describe services that will include, but are not limited to, types of coverages that are requested in the RFI that respondent will recommend for the WFSDallas. Please describe all innovations or industry standards not presently covered.

List of Owners/Officers/Board

The respondent must provide individual's name, position/title, business address and phone number. In addition, please note that a pre-printed list (as applicable) may be substituted, if it is current, complete and available.

List of Recent References

The respondent must provide a list of four companies to which your organization has provided the proposed or similar services within the past three (3) years. The following information is requested: company name and street address, mailing address, contact person and title, and phone/e-mail/fax.

B. Risk Management Insurance

WFSDallas is seeking information on qualified, experienced and preferably nationally recognized insurance brokers to arrange necessary insurance coverage and risk management for WFSDallas for the coming year, July 1, 2021 to June 30, 2022. Services may include, but are not limited to the following:

- Develop a schedule of recommended insurance coverages based on current information supplied in Schedule of Insurance (Exhibit B) provided in this RFI. Prospective brokers should offer comparable or improved insurance coverages for similar or lesser premiums. In addition, we have provided a listing of our Workforce Solutions Office locations including current number of staff and dollar amount for inventory items (Exhibit C) for information only.
- Obtain insurance coverage quotation from insurance companies rated B+ or better by AM Best;
- Advise WFSDallas on recommended strategies for risk management; and
- Periodically update WFSDallas on changes in the insurance industry and recommendations.

Evaluation Criteria/Point Value for Evaluation Criteria

Selection of a broker will be based on broker’s demonstrated competence and quality of proposed insurance coverage/strategies for risk assessment. In addition to the aforementioned for a broker as broker for services, the current broker will demonstrate competence in handling WFSDallas insurance affairs during the existing letter of authorization period. Following is the point value for the evaluation criteria:

Broker’s Demonstrated Competence (New Brokers) or (Current Broker) 50

The respondent will demonstrate history of organization providing services, qualifications and experience, and licenses (if applicable) as referenced in this RFI. The respondent will also note any years of experience as broker for services on behalf of small businesses and non-profit organizations. The current broker will also demonstrate competence handling WFSDallas insurance coverages and other associated affairs during the existing letter of authorization period.

Quality of Proposed Insurance Coverage/Strategies for Risk Assessment 50

The WFSDallas is interested in improving coverage and risk management strategies. The respondent will describe services that will include, but are not limited to, types of coverages that are requested in the RFI that respondent will recommend for the WFSDallas. The respondent will also describe all innovations or industry standards not presently covered.

Total Possible Points for Proposal Response 100

Response Checklist and Order of Submission

The proposal must be submitted in the following order:

Proposal Cover Sheet (Attachment A)

All items on the Proposal Cover Sheet must be completed. Identify a liaison or primary contact person, as well as the Signatory Authority – a person with the legal authority to negotiate and sign an agreement on behalf of the proposing entity. (This is also the person who must sign the required certification forms upon approval to provide the brokerage service.)

Proposal Narrative

The respondent must include demonstrative history of organization providing services, qualifications and experience, and licenses (if applicable) as referenced in this RFI. Please also note any years of experience as broker for services on behalf of small businesses and non-profit organizations. In addition, the respondent must describe services that will include, but are not limited to, types of coverages that are

requested in the RFI that respondent will recommend for the WFSDallas. Please describe all innovations or industry standards not presently covered.

Cost/Coverage Proposed (use the format included for Cost/Coverage Proposed)

The respondent must complete the chart (Exhibit D) provided. Please include all of the information requested. We understand that premium quotes may be dependent upon more detailed information from WFSDallas, but we are interested in your proposed schedule and probable companies. We are not opposed to retaining the carriers and policies currently in place.

List of Owners/Officers/Board

The respondent must provide individual's name, position/title, business address and phone number. In addition, please note that a pre-printed list (as applicable) may be substituted, if it is current, complete and available.

List of Recent References

The respondent must provide a list of four companies to which your organization has provided the proposed or similar services within the past three (3) years. The following information is requested: company name and street address, mailing address, contact person and title, and phone/e-mail/fax.

C. Real Estate Leasing

WFSDallas is seeking information from qualified and experienced real estate brokers to represent the WFSDallas in real estate leasing. Services may include, but are not limited to the following:

- A full procurement process to identify available office space;
- Preparation of lease proposals;
- Review and analysis of lease documents;
- Lease negotiations; and
- Ongoing tenant representation for the duration of the lease.

Evaluation Criteria/Point Value for Evaluation Criteria

Selection of a broker will be based on the scope of tenant representation services, demonstrated competence in providing the services solicited, and qualifications and experience. In addition to the aforementioned for a broker as broker for services, the current broker will also demonstrate competence in handling WFSDallas real estate leasing affairs during the existing letter of authorization period. Following is the point value for the evaluation criteria:

Scope of Tenant Representation Services

30

The respondent will provide a thorough description of the proposed method for providing the Real Estate Brokerage services solicited by the WFSDallas. The respondent will include a detail description of the Tenant Representation Services available to ensure effective real estate transactions. The scope of services should include, but are not limited to, lease negotiation, landlord contact during the duration of lease.

Demonstrated Competence

40

The respondent will describe services provided in the past three (3) years that demonstrate organization's capability to perform the services proposed.

The respondent should list four (4) previous customers inclusive of the following information: organization name and street address, the nature of the services provided, scope of activities, contact person, title and phone number/e-mail address.

Qualifications and Experience

30

The respondent will include qualifications, experience and licenses of key personnel who will be WFSDallas' point of contact. In addition, the respondent will include resumes on key personnel.

Total Possible Points for Proposal Response

100

Proposal Cover Sheet (Attachment A)

All items on the Proposal Cover Sheet must be completed. Identify a liaison or primary contact person, as well as the Signatory Authority – a person with the legal authority to negotiate and sign an agreement on behalf of the proposing entity. (This is also the person who must sign the required certification forms upon approval to provide the brokerage service.)

Proposal Narrative

The respondent must provide a thorough description of the proposed method for providing the Real Estate Brokerage services solicited by the WFSDallas, including:

1. Scope of Tenant Representation Services – Please provide a detail description of the Tenant Representation Services available to ensure effective real estate transactions. Scope of services should include, but are not limited to, lease negotiation, landlord contact during the duration of lease.
2. Demonstrated Competence – Describe services your organization has provided in the past three years that demonstrate your organization's capability to perform the services proposed. Please include four (4) previous customers and include: organization name and street address, the nature of the services provided, scope of activities, contact person, title and phone number/e-mail address.
3. Qualifications and Experience – Please include qualifications, experience and licenses of key personnel who will be WFSDallas' point of contact. **Please attach resumes for key personnel.**

List of Owners/Officers/Board

The respondent must provide individual's name, position/title, business address and phone number. In addition, please note that a pre-printed list (as applicable) may be substituted, if it is current, complete and available.

List of Recent References

The respondent must provide a list of four companies to which your organization has provided the proposed or similar services within the past three (3) years. The following information is requested: company name and street address, mailing address, contact person and title, and phone/e-mail/fax.