



**INVITATION TO BID  
INSTRUCTIONS/TERMS OF CONTRACT  
SPECIFICATIONS  
BID SHEET(S)  
FOR**

**RFP 2013-0501: GROUP HEALTH INSURANCE AND STOP LOSS & TPA SERVICES**

**PER  
THE CITY OF SACHSE SPECIFICATIONS  
AT  
THE CITY OF SACHSE  
HUMAN RESOURCES DEPARTMENT**

**OPENING DATE: THURSDAY, FEBRUARY 22, 2013, 2:00 P.M.**



## INVITATION TO BID

Return Bid To: City of Sachse  
Human Resources Department  
3815 Sachse Road, Building B  
Sachse, Texas 75048

The enclosed *Invitation To Bid* and accompanying *Specifications with Bid Sheets* are for your convenience in bidding the enclosed referenced products and/or services for the City of Sachse. **Sealed bids shall be received no later than: THURSDAY, THURSDAY, FEBRUARY 21, 2013, 2:00 P.M.**

Please reference **RFP 2013-0501, "GROUP HEALTH INSURANCE and Stop Loss & TPA Services,"** in all correspondence pertaining to this bid and affix this number to outside front of bid envelope for identification. All bids shall be to the attention of the Human Resources Department.

The City of Sachse appreciates your time and effort in preparing a bid. Please note that all **bids must be received at the designated location by the deadline shown**. Bids received after the deadline will be returned unopened and shall be considered void and unacceptable. Bid opening is scheduled to be held in the Human Resources Department, 3815 Sachse Road, Building B, Sachse, Texas. **You are invited to attend.**

If Bidder desires not to bid at this time, but wishes to remain on the commodity bid list, please submit a **"NO BID"** response (same time/location). The City of Sachse is always very conscious and extremely appreciative of the time and effort expended to submit a bid. However, on "NO BID" responses please communicate any bid requirement(s) which may have influenced your decision to "NO BID."

If response is not received in the form of a "BID" or "NO BID" for three (3) consecutive Invitation To Bid, Bidder shall be removed from said bid list. However, if you choose to "NO BID" at this time but desire to remain on the bid list for other commodities, please state the specific product/service for which your firm wishes to be classified.

Awards should be made approximately three weeks following the bid opening date. To obtain results, or if you have any questions, please contact the Human Resources Department at 972-495-1212.



**INVITATION TO BID**  
**INSTRUCTIONS/TERMS OF CONTRACT**  
**RFP 2013-0501**  
**GROUP HEALTH INSURANCE and Stop Loss & TPA Services**

By order of the City Council of the City of Sachse, Texas, sealed bids will be received for:

**GROUP HEALTH INSURANCE and Stop Loss & TPA Services**

*TO PROVIDE* for an annual Contract commencing after the date of the award and continuing for twelve month period. The City of Sachse, City Council reserves the right to extend this contract for four (4) additional one-year periods as it deems to be in the best interest of the city.

*IT IS UNDERSTOOD* that the City Council of the City of Sachse, Texas reserves the right to reject any and/or all bids for any/or all products and/or services covered in this bid request and to waive informalities or defects in bids or to accept such bids as it shall deem to be in the best interests of the City of Sachse.

*BIDS MUST BE* submitted on the pricing forms included for that purpose in this packet. Each bid shall be placed in a separate sealed envelope, with **each page manually signed by a person having the authority to bind the firm in a Contract**, and marked clearly on the outside as shown below. **FACSIMILE TRANSMITTALS SHALL NOT BE ACCEPTED!**

*SUBMISSION OF BIDS:* Sealed bids shall be submitted no later than **THURSDAY, FEBRUARY 21, 2013, 2:00 P.M.** to the address as follows:

City of Sachse  
Human Resources Department  
3815 Sachse Road, Building B  
Sachse, Texas 75048

**MARK ENVELOPE:** "RFP 2013-0501, GROUP HEALTH INSURANCE and Stop Loss & TPA Services"

**ALL BIDS MUST BE RECEIVED IN THE CITY'S HUMAN RESOURCES DEPARTMENT  
BEFORE OPENING DATE AND TIME.**

**BIDDERS PLEASE NOTE:**

**TWO COPIES OF THE FOLLOWING BID SHEETS HAVE BEEN ENCLOSED FOR YOUR CONVENIENCE**

- Bid Affidavit Form (required)
- Response Form (required)
- Conflict of Interest Form (required)
- Actual rates, terms & conditions of proposal (required)

**PUBLIC NOTICE STATEMENT FOR ADA COMPLIANCE**

The City of Sachse acknowledges its responsibility to comply with the Americans With Disabilities Act of 1990. Thus, in order to assist individuals with disabilities who require special services (i.e. sign interpretative services, alternative audio/visual devices, and amanuenses) for participation in or access to the City of Sachse sponsored public programs, services and/or meetings, the City requests that individuals make request for these services forty-eight (48) hours ahead of the scheduled program, service and/or meeting. To make arrangements, contact Laura Morrow HR Director or other designated official at (469) 429-4799.

**FUNDING:** Funds for payment have been provided through the City of Sachse budget approved by the City Council for this fiscal year only. State of Texas statutes prohibit the obligation and expenditure of public funds beyond the fiscal year for which a budget has been approved. Therefore, anticipated orders or other obligations that may arise past the end of the current fiscal year shall be subject to budget approval.

**LATE BIDS:** Bids received in the City of Sachse Human Resources Department after submission deadline will be considered void and unacceptable. The City of Sachse is not responsible for lateness or non-delivery of mail, carrier, etc., and the date/time stamp in the Human Resources Department shall be the official time of receipt.

**ALTERING BIDS:** Bids can be negotiated, amended, and/or revised after the bid opening prior to contract placement provided any changes are in writing as indicated in the enclosed executed waiver by the City to House Bill 1466, Article 21.49.16 of the Texas Insurance Code. Any interlineation, alteration, or erasure made before opening time must be initialed by the signer of the bid, guaranteeing authenticity. The City reserves the right to accept, negotiate, amend or reject any/all of the bid as it deems to be in the best interest of the City.

**CITY OF SACHSE RIGHTS FOR NEGOTIATION:** As provided in this request for proposals, discussion may be conducted with responsible offerors who submit priced bids determined to be reasonably susceptible of being selected for award. Offerors must be accorded fair and equal treatment with respect to any opportunity for discussion and revision of proposals, and revisions may be permitted after submission and before award for the purpose of obtaining the best and final offers.

**WITHDRAWAL OF BID:** A bid may not be withdrawn or canceled by the Bidder without the permission of the City for a period of ninety (90) days following the date designated for the receipt of bids, and Bidder so agrees upon submittal of their bid.

**SALES TAX:** The City of Sachse is exempt by law from payment of Texas State Sales Tax and Federal Excise Tax. Bidder shall include any sales taxes from concession sales of taxable items on City property in the total price of the sale, and shall be responsible to report and pay such taxes in a timely manner.

**BID AWARD:** The City reserves the right to award any combination of the three sections as is deemed in the best interest of the City. The City also reserves the right to not award one or none of the sections.

**CONTRACT:** This bid, when properly accepted by the City of Sachse, shall constitute a Contract equally binding between the successful Bidder and the City. No different or additional terms will become a part of this Contract with the exception of Change Orders.

**CHANGE ORDERS:** No oral statement of any individual shall modify or otherwise change, or affect the terms, conditions or Specifications stated in the resulting Contract. All Change Orders to the Contract will be made in writing by the City's Purchasing Agent.

**IF DURING THE** life of the Contract, the successful Bidder's net prices to other customers for items awarded herein are reduced below the Contracted price, it is understood and agreed that the benefits of such reduction shall be extended to the City of Sachse.

**A PRICE** redetermination may be considered by the City only at the anniversary date of the Contract and shall be substantiated in writing (i.e., Manufacturer's direct cost, postage rates, Railroad Commission rates, Wage/Labor rates, etc.). The Bidder's past history of honoring Contracts at the bid price will be an important consideration in the evaluation of the lowest and best bid. The City reserves the right to accept or reject any/all of the price redetermination as it deems to be in the best interest of the City.

**DELIVERY:** all delivery and freight charges (F.O.B. City of Sachse) are to be included in the bid price.

**DELIVERY TIME:** Bids shall show number of days required to place goods ordered at the City's designated location. Failure to state delivery time may cause bid to be rejected. Successful Bidder shall notify the Human Resources Department immediately if delivery schedule cannot be met. If delay is foreseen, successful Bidder shall give written notice to the Purchasing Agent. The City has the right to extend delivery time if reason appears valid. Successful Bidder must keep the Human Resources Department advised at all times of the status of the order.

**CONFLICT OF INTEREST:** No public official shall have interest in this Contract, in accordance with Vernon's Texas Codes Annotated, Local Government Code Title 5. Subtitle C, Chapter 171.

**DISCLOSURE OF CERTAIN RELATIONSHIPS** 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 Sachse not later than the 7<sup>th</sup> 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.

**ETHICS:** The Bidder shall not offer or accept gifts of anything of value nor enter into any business arrangement with any employee, official or agent of the City of Sachse.

**EXCEPTIONS/SUBSTITUTIONS:** All bids meeting the intent of this Invitation To Bid will be considered for award. Bidders taking exception to the Specifications, or offering substitutions, shall state these exceptions in the section provided or by attachment as part of the bid. In the absence of such, a list

shall indicate that the Bidder has not taken exceptions and shall hold the Bidder responsible to perform in strict accordance with the Specifications of the Invitation. The City of Sachse reserves the right to accept any and all, or none, of the exception(s)/ substitution(s) deemed to be in the best interest of the City.

**ADDENDA:** Any interpretations, corrections or changes to this **Invitation To Bid** and **Specifications** will be made by addenda. Sole issuing authority of addenda shall be vested in the City of Sachse Purchasing Agent. Addenda will be mailed to all who are known to have received a copy of this Invitation To Bid. Bidders shall acknowledge receipt of all addenda.

**DESCRIPTIONS:** Any reference to model and/or make/manufacturer used in bid Specifications will be made by addenda. Sole issuing authority of addenda shall be vested in the City's Purchasing Agent. Addenda will be mailed to all who are known to have received a copy of this invitation to Bid. Bidders shall acknowledge receipt of all addenda.

**BID MUST COMPLY** with all federal, state, county, and local laws concerning these types of service(s).

**DESIGN, STRENGTH, QUALITY** of materials must conform to the highest standards of manufacturing and engineering practice.

All items supplied against credit must be new and unused, unless otherwise specified, in first-class condition and of current manufacturer.

**MINIMUM STANDARDS FOR RESPONSIBLE PROSPECTIVE BIDDERS:** A prospective Bidder must affirmatively demonstrate Bidder's responsibility. A prospective Bidder must meet the following requirements:

1. Have adequate financial resources, or the ability to obtain such resources as required;
2. be able to comply with the required or proposed delivery schedule;
3. have a satisfactory record of performance;
4. have a satisfactory record of integrity and ethics;
5. be otherwise qualified and eligible to receive an award.

The City may request representation and other information sufficient to determine Bidder's ability to meet these minimum standards listed above.

**REFERENCES:** The City requests Bidder to supply, with this Invitation To Bid, a list of at least three (3) references where like products and/or services have been supplied by their firm. Include name of firm, address, telephone number and name of representative.

**BIDDER SHALL PROVIDE** with this bid response, all documentation required by this Invitation To Bid. Failure to provide this information may result in rejection of bid.



***SUCCESSFUL BIDDER SHALL*** defend, indemnify and save harmless the City of Sachse and all its officers, agents and employees from all suits, actions, or other claims of any character, name and description brought for or on account of any injuries or damages received or sustained by any person, persons, or property on account of any negligent act or fault of the successful Bidder, or of any agent, employee, subcontractor or supplier in the execution of, or performance under, any Contract which may result from bid award. Successful Bidder indemnifies and will indemnify and save harmless the City from liability, claim or demand on their part, agents, servants, customers, and/or employees whether such liability, claim or demand arise from event or casualty happening or within the occupied premises themselves or happening upon or in any of the halls, elevators, entrances, stairways or approaches of or to the facilities within which the occupied premises are located. Successful Bidder shall pay any judgment with costs which may be obtained against the City growing out of such injury or damages. In addition, Contractor shall obtain and file with Owner City of Sachse a Standard Certificate of Insurance and applicable policy endorsement evidencing the required coverage and naming the owner City of Sachse as an additional insured on the required coverage.

***WAGES:*** Successful Bidder shall pay or cause to be paid, without cost or expense to the City of Sachse, all Social Security, Unemployment and Federal Income Withholding Taxes of all such employees and all such employees shall be paid wages and benefits as required by Federal and/or State Law.

***TERMINATION OF CONTRACT:*** This Contract shall remain in effect until Contract expires, delivery and acceptance of products and/or performance of services ordered or terminated by either party with a thirty (30) day written notice prior to any cancellation. The successful Bidder must state therein the reasons for such cancellation. The City of Sachse reserves the right to award canceled Contract to next lowest and best Bidder as it deems to be in the best interest of the City of Sachse.

***TERMINATION FOR DEFAULT:*** The City of Sachse reserves the right to enforce the performance of this Contract in any manner prescribed by law or deemed to be in the best interest of the City in the event of breach or default of this Contract. The City of Sachse reserves the right to terminate the Contract immediately in the event the successful Bidder fails to:

1. Meet schedules;
2. defaults in the payment of any fees; or
3. otherwise perform in accordance with these Specifications.

Breach of Contract or default authorizes the City of Sachse to exercise any or all of the following rights:

1. The City may take possession of the assigned premises and any fees accrued or becoming due to date;

2. the City may take possession of all goods, fixtures and materials of successful Bidder therein and may foreclose its lien against such personal property, applying the proceeds toward fees due or thereafter becoming due.

In the event the successful Bidder shall fail to perform, keep or observe any of the terms and conditions to be performed, kept or observed, the City shall give the successful Bidder written notice of such default; and in the event said default is not remedied to the satisfaction and approval of the city within two (2) working days of receipt of such notice by the successful Bidder, default will be declared and all the successful Bidder's rights shall terminate.

Bidder, in submitting this bid, agrees that the City of Sachse shall not be liable to prosecution for damages in the event that the City declares the Bidder in default.

**NOTICE:** Any notice provided by this bid (or required by law) to be given to the successful Bidder by the City of Sachse shall conclusively deemed to have been given and received on the next day after such written notice has been deposited in the mail in the City of Sachse, Texas by Registered or Certified Mail with sufficient postage affixed thereto, addressed to the successful Bidder at the address so provided; provided this shall not prevent the giving of actual notice in any other manner.

**PATENTS/COPYRIGHTS:** The successful Bidder agrees to protect the City of Sachse from claims involving infringement of patents and/or copyrights.

**CONTRACT ADMINISTRATOR:** Under this Contract, the City of Sachse may appoint a Contract Administrator with designated responsibility to ensure compliance with Contract requirements, such as but not limited to, acceptance, inspection and delivery. The Contract Administrator will serve as liaison between the City of Sachse Human Resources Department (which has the overall Contract Administration responsibilities) and the successful Bidder.

**PURCHASE ORDER:** A Purchase Order(s) shall be generated by the City of Sachse to the successful Bidder. The Purchase Order number must appear on all itemized invoices and packing slips. The City of Sachse will not be held responsible for any orders placed/delivered without a valid current Purchase Order number.

**PACKING SLIPS** or other suitable shipping documents shall accompany each special order shipment and shall show: (a) name and address of successful Bidder, (b) name and address of receiving department and/or delivery location, (c) Purchase Order number, and (d) descriptive information as to the item(s) delivered, including product code, item number, quantity, number of containers, etc.

**INVOICES** shall show all information as stated above, shall be issued for each Purchase Order and shall be mailed directly to the City of Sachse Finance/Accounts Payable Department, 3815 Sachse Road, Building B, Sachse, Texas 75048.

**PAYMENT** will be made upon receipt and acceptance by the City of Sachse for any item(s) ordered and receipt of a valid invoice, in accordance with the State of Texas Prompt Payment Act, Article 601f V.T.C.S. Successful Bidder(s) required to pay subcontractors within ten (10) days.

**ITEMS** supplied under this Contract shall be subject to the City's approval. Items found defective or not meeting Specifications shall be picked up and replaced by the successful Bidder at the next service date at no expense to the City of Sachse. If item is not picked up within one (1) week after notification, the item will become a donation to the City for disposition.

**SAMPLES:** When requested, samples shall be furnished free of expense to the City of Sachse.

**WARRANTY:** Successful Bidder shall warrant that all items/services shall conform to the proposed Specifications and/or all warranties as stated in the Uniform Commercial Code and be free from all defects in material, workmanship and title. A copy of the warranty for each item being bid must be enclosed. Failure to comply with the above requirements for literature and warranty information could cause bid to be rejected.

**REMEDIES:** The successful Bidder and the City of Sachse agree that both parties have all rights, duties and remedies available as stated in the Uniform Commercial Code.

**VENUE:** This Agreement will be governed and construed according to the laws of the State of Texas. This Agreement is performable in the City of Sachse, Texas.

**ASSIGNMENT:** The successful Bidder shall not sell, assign, transfer or convey this Contract, in whole or in part, without prior written consent of the City of Sachse.

**SPECIFICATIONS** and model numbers are for description only. Bidder may bid on description only. Bidder may bid on alternate model but must clearly indicate alternate model being bid. Bidder must enclose full descriptive literature on alternate item(s).

**SILENCE OF SPECIFICATION:** The apparent silence of these Specifications as to any detail or to the apparent omission of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of these Specifications shall be made on the basis of this statement.

Each insurance policy to be furnished by successful Bidder shall include, by endorsement to the policy, a statement that a notice shall be given to the City of Sachse by Certified Mail thirty (30) days prior to cancellation or upon any material change in coverage.

***EMPLOYMENT ELIGIBILITY VERIFICATION:*** The Immigration Reform and Control Act of 1986 (IRCA) makes it illegal for employers to knowingly hire or recruit immigrants who do not possess lawful work authorization and requires employers to verify their employees' work eligibility on a U.S. Department of Justice form I-9. The contractor/vendor warrants that contractor/vendor is in compliance with IRCA and will maintain compliance with IRCA during the term of the contract with the city. Contractor/vendor warrants that contractor/vendor has included or will include a similar provision in all written agreements with any subcontractors engaged to perform services under this contract.

***ENVIRONMENTALLY PREFERABLE PRODUCTS AND SERVICES:*** Bidders are encouraged to offer Energy Star, GreenSeal, EcoLogo and/or EPEAT certified products. The city also encourages bidders to offer products and services that are produced or delivered with minimal use of virgin materials and maximum use of recycled materials and reduce waste, energy usage, water utilization and toxicity in the manufacture and use of products.

***ANY QUESTIONS*** concerning this Invitation To Bid and Specifications should be directed to Carolyn Summy-Thompson, Brinson Benefits, Inc., 214.379.5172, carolyn@brinsonbenefits.com.

## GENERAL REQUIREMENTS

- 1) The information contained in these specifications is confidential and is to be used only in connection with preparing a bid for all or part of the following employee benefit plans:
  - ★ Group Medical Insurance
  - ★ Stop Loss and TPA Services
- 2) Currently all products are offered on a May 1 effective date.
- 3) All bid responses should be provided on the enclosed response forms with the signature of your authorized representative. If attachments are necessary, please provide. **DO NOT MODIFY RESPONSE FORMS.** Proposals must include two hard copies and one electronic (CD) copy of the completed Bid Affidavit, Response Form, Conflict of Interest Form including actual rates, terms and conditions. Any additional information should be provided at the end of the response form. Contact Brinson Benefits, Inc. for a copy of the response forms to be sent via email for your convenience.
- 4) The City has appointed Brinson Benefits as their Agent of Record/Employee Benefit Consultant **and is not selecting a new broker/consultant** therefore; Group Medical Insurance should be submitted on a **NET commission basis**. If you are required to include commissions in your products, please note this clearly on your response form.
- 5) Retirees are not covered. Covered participants include: Full Time employees, Surviving Spouses/Families of deceased Safety Officers and COBRA participants. The census does identify these participants.
- 6) No telephone, telephonic or fax bids will be accepted. Bids must be sealed and delivered to the Human Resources Department at The City of Sachse prior to the official bid opening time. The City will not be responsible for missing, lost or late proposals. Any bids received after the time set for opening will be returned to the sender.
- 7) The information contained herein is believed to be accurate and up-to-date, but is not intended to be an express or implied warranty.
- 8) Bids are to be submitted on the basis of the specifications contained herein. Alternate bids are encouraged and will be considered provided the alternatives enhance the current plan and are clearly explained. All deviations from the specifications must be clearly identified and explained.
- 9) The City of Sachse reserves the right to negotiate, amend, accept or reject all or any part of the bids, waive minor technicalities, and award the bid that best serves the interest of the City. The City also reserves the right to waive or dispense with any of the formalities contained herein.
- 10) Proposals must be submitted for coverage on all eligible full-time regular employees and their dependents. Full-time is defined as 40 or more hours per week. Dependent is defined as the employee's spouse and/or unmarried children from birth to age 26 and claimed as a dependent.

- 11) Waiting period: Newly hired employees and their dependents must complete 30 days of active employment before becoming eligible for coverage.
- 12) Eligibility: All full-time employees and their dependents are eligible following the waiting period.
- 13) Contribution: Medical is employer paid for employee only coverage and contributes 35% to dependent coverage.
- 14) Social Security: City participates in both social security and TMRS (Texas Municipal Retirement System) retirement plan.
- 15) Workers' Compensation – City has State Workers Comp.
- 16) The number of sworn police officers is 34. The number of sworn fire officers is 20.

The City of Sachse is aware of the time and effort you expend in preparing and submitting proposals to the City. Please let us know of any requirements in the RFP that are causing you difficulty in responding. We want to make this process as easy as possible so that all responsible vendors can compete for the City's business.

City of Sachse  
**STOP LOSS SPECIFIC AND AGGREGATE REINSURANCE and TPA  
 SERVICES**

**1. Assumptions**

- a) The City offers a fully insured PPO plan. See attached plan design. The bid is based on duplication of current benefits. Alternate plan designs are welcome.
- b) The City pays 100% employee costs and 35% dependent costs.
- c) Census

<i>COVERAGE</i>	<b>PPO</b>
Employee Only	68
Employee & Spouse	11
Employee & Child(ren)	27
Employee & Family	13
COBRA	0
Waived	3

- d) Effective date is May 1, 2013.
- e) All participants enrolled in the plan as of April 30, 2013 are to be covered on a “No loss/No gain” basis. “No loss/No gain” for participants is to include credit for accumulated deductible and coinsurance as applicable. The participant will provide documentation for this credit.
- e) The selected insurance provider will provide enrollment and educational materials, as well as participant in the City’s annual open enrollment presentations.
- f) The City must receive renewal rates by January 26th preceding the May 1<sup>st</sup> renewal date. Refer to the Bid Affidavit.
- g) A true open enrollment is required annually.
- h) COBRA/HIPAA will be administered by COBRA Charmers, Inc. This is not anticipated to change.
- i) See attached (Exhibit 1) for current summary of benefits.

## 2. Rates and History

### Current Renewal Period Large Claim / Ongoing Medical Conditions Detail:

See attached claims data from Aetna: The City has knowledge of the following relating to the large claims indicated by Aetna:

- 1) \$30,014 – no further information known
- 2) \$84,047 – no further information known
- 3) \$145,242 – no further information known
- 4) \$15,390 – no further information known
- 5) \$15,161 – no further information known
- 6) \$16,466 – no further information known
- 7) \$19,317 – no further information known
- 8) \$23,812 – no further information known

### *PPO*

<b>PPO MEDICAL PLAN YEAR NET OF COMMISSION</b>	<b>Employee Only</b>	<b>EE+ Spouse</b>	<b>EE+ Child(ren)</b>	<b>EE+ Family</b>
<b>May 1, 2013 – April 30, 2014 RENEWAL</b>	<b>\$534.99</b>	<b>\$1,166.27</b>	<b>\$861.32</b>	<b>\$1,578.22</b>
<b>May 1, 2012 – April 30, 2013</b>	\$380.41	829.29	\$612.45	\$1,122.21
<b>May 1, 2011 – April 30, 2012</b>	\$375.96	\$819.60	\$605.30	\$1109.10
<b>May 1, 2010 – April 30, 2011</b>	\$389.97	\$850.13	\$627.85	\$1150.41
<b>May 1, 2009 – April 30, 2010</b>	\$365.26	\$796.63	\$587.34	\$1079.33
<b>May 1, 2008 – April 30, 2009</b>	\$367.32	\$801.11	\$590.64	\$1085.35
<b>May 1, 2007 – April 30, 2008</b>	\$334.63	\$729.81	\$538.07	\$988.81
<b>May 1, 2006 – April 30, 2007</b>	\$347.98	\$794.85	\$650.43	\$1097.29
<b>May 1, 2005 – April 30, 2006</b>	\$332.35	\$759.13	\$621.20	\$1047.98
<b>May 1, 2004 – April 30, 2005</b>	\$319.57	\$729.93	\$597.31	\$1007.67

Carrier History:	PPO Medical
RENEWAL	Aetna PPO
May 1, 2013 – April 30, 2014	Aetna PPO
May 1, 2012 – April 30, 2013	Aetna PPO
May 1, 2011 – April 30, 2012	Aetna PPO
May 1, 2010 – April 30, 2011	United Healthcare PPO
May 1, 2009 – April 30, 2010	Cigna PPO



May 1, 2008 – April 30, 2009	Cigna PPO
May 1, 2008 – April 30, 2009	Unicare PPO
May 1, 2007 – April 30, 2008	Unicare PPO
May 1, 2006 – April 30, 2007	Aetna HMO / PPO
May 1, 2005 – April 30, 2006	Aetna HMO / PPO
May 1, 2004 – April 30, 2005	Aetna HMO / PPO

3. Schedule of Benefits  
See Exhibit VI

City of Sachse  
EMPLOYEE INSURANCE EXHIBITS

**EXHIBIT I**

Summary of Benefits – Medical (provided in .pdf)

**EXHIBIT II**

Medical Census (provided in an excel spreadsheet)

**EXHIBIT III**

Medical Claim Experience Reports (provided in .pdf & .xls)

**EXHIBIT IV**

Three Required Forms (provided below)

- Bid Affidavit Form
- Response Forms
- Conflict of Interest Form

**RFP 2013-0501**

**SPECIFIC AND AGGREGATE STOP LOSS INSURANCE  
and TPA SERVICES**

**BIDDERS PLEASE NOTE: TWO COPIES OF THE FOLLOWING BID SHEETS HAVE BEEN ENCLOSED FOR YOUR CONVENIENCE**

- Bid Affidavit Form (required)
- Response Form (required)
- Conflict of Interest Form (required)
- Actual fees, terms & conditions of proposal (required)

**TWO COPIES AND ONE ELECTRONIC (CD) COPY MUST BE RETURNED TO THE HUMAN RESOURCES DEPARTMENT NO LATER THAN THURSDAY, FEBRUARY 21, 2013, 2:00 P.M. CST**

## CITY OF SACHSE BID AFFIDAVIT (REQUIRED)

The undersigned certifies that they are a duly authorized officer/agent and authorized to execute the foregoing on behalf of the bidder. The bid prices contained in this bid has been carefully reviewed and is submitted as correct. Bidder further certifies and agrees to furnish any and all services effective May 1, 2013 upon the acceptance of the final proposal as firm and final on or before March 1, 2013 (including any amendments and/or negotiations) and upon the conditions contained in the Specifications of this REQUEST FOR PROPOSAL. Subsequent renewals, specifically the initial renewal, must be delivered to the City no later than January 24, 2014 and firm and final no later than March 1, 2014 for a May 1, 2014 effective date. The period of acceptance of this bid will be   90   calendar days from the date of the bid opening. (Period of acceptance will be ninety (90) calendar days unless otherwise indicated by Bidder.)

I hereby certify that the foregoing bid has not been prepared in collusion with any other Bidder or individual(s) engaged in the same line of business prior to the official opening of this bid. Further, I certify that the Bidder is not now, nor has been for the past six (6) months, directly or indirectly concerned in any pool, agreement or combination thereof, to control the price of services/commodities bid on, or to influence any individual(s) to bid or not to bid.

- Bids provided (check all that apply):
- Medical – Group Medical Insurance
  - Medical - Stop Loss Reinsurance
  - Medical – TPA Services

<b>Company Name</b>	
<b>Company Address (street, Town, state, zip)</b>	
<b>Telephone Number</b>	
<b>E-mail address</b>	
<b>Fax Number</b>	
<b>Contact Name</b>	
<b>Title</b>	
<b>Authorized Signature</b>	
<b>Date</b>	

## CITY OF SACHSE RESPONSE FORMS (REQUIRED)

PPO MEDICAL PLAN YEAR NET OF COMMISSION	Employee Only	EE+ Spouse	EE+ Child(ren)	EE+ Family
<b>May 1, 2013 – April 30, 2014</b>				

Specific and Aggregate Stop Loss 5/1/2013 – 4/30/2014	Employee	Family
\$40k Specific premiums Aggregate premiums Aggregate stop loss factors <b><u>(attach actual quote, terms &amp; conditions)</u></b>	\$ _____ \$ _____ \$ _____	\$ _____ \$ _____ \$ _____

**CONFLICT OF INTEREST QUESTIONNAIRE  
FORM CIQ (REQUIRED)**

**For vendor or other person doing business with local governmental entity**

This questionnaire is being filed in accordance with chapter 176 of the Local Government Code by a person doing business with the governmental entity.

By law this questionnaire must be filed with the records administrator of the local government not 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.

**OFFICE USE ONLY**

Date Received

**1 Name of person doing business 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 September 1 of the year for which an activity described in Section 176.006(a), Local Government Code, is pending and not later than the 7th business day after the date the originally filed questionnaire becomes incomplete or inaccurate.)

**3 Name each employee or contractor of the local governmental entity who makes recommendations to a local government officer of the governmental entity with respect to expenditures of money AND describe the affiliation or business relationship.**

**4 Name each local government officer who appoints or employs local government officers of the governmental entity for which this questionnaire is filed AND describe the affiliation or business relationship.**

Adopted 11/02/2005

**FORM CIQ**

**CONFLICT OF INTEREST QUESTIONNAIRE**

**Page 2**

**For vendor or other person doing business with local governmental entity**

**5 Name of local government officer with whom filer has affiliation or business relationship. (Complete this section only if the answer to A, B, or C is YES.**

This section, item 5 including subparts A, B, C & D, must be completed for each officer with whom the filer has affiliation or other relationship. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer named in this section receiving or likely to receive taxable income from the filer of the questionnaire?  Yes  No

B. Is the filer of the questionnaire receiving or likely to receive taxable income from or at the direction of the local government officer named in this section AND the taxable income is not from the local governmental entity?  Yes  No

C. Is the filer of this questionnaire affiliated with a corporation or other business entity that the local government officer serves as an officer or director, or holds an ownership of 10 percent or more?  Yes  No

D. Describe each affiliation or business relationship.

6

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

\_\_\_\_\_  
Date

Adopted 11/02/2005