

REQUEST FOR STATEMENT OF QUALIFICATIONS AND PROPOSALS



Insurance Broker Services

Group Health, Life, Vision and Dental

Respond by
March 5, 2024
3:00 PM

REQUEST FOR STATEMENT OF QUALIFICATIONS AND PROPOSALS

BACKGROUND AND OVERVIEW

The City of Marceline, Missouri is seeking Statement of Qualifications/Proposals from experienced firms to provide Insurance Broker Services for the City and to act as the City's insurance agent to provide health, life, vision and dental insurance. The City is seeking firms or agents with demonstrated experience in servicing municipal insurance needs. The City currently has a Missouri Chamber Federation Benefit Plan. Firms must currently have the ability to be able to offer Missouri Chamber Federation Benefit Plans at the time of proposal submission.

CITY INFORMATION

The City of Marceline is a third-class city operating under a City Manager/Council form of government. The City of Marceline is located in Linn and Chariton Counties, Missouri and has an estimated population of approximately 2,123. The City provides municipal services to its citizens consisting of police, fire, street, parks, water, wastewater, and electric and employs approximately 32 full time employees. The City's current plan year runs from July 1 to June 30.

SCOPE OF SERVICES

The City will require the successful firm to advise the City on insurance needs, offer suggestions, and confer with the City regarding problems that may arise. Additionally, the firm will be responsible for seeking insurance for the City's employee health, life, dental and vision insurance needs, and acting as the City's representative for the purchase and administration of insurance policies. Potential services include but are not limited as follows:

- Bid out the City's employee health, life, dental and vision insurance on an annual basis based on the City's needs
- Assist with claim problems and benefit questions
- Quote the insurance out, determining competitive rates
- Contact client on regular basis for updates, problems and concerns
- Available for employee meetings
- Assist with open enrollment of employees

INSTRUCTIONS/PROPOSAL FORMAT

The proposal must include the completed questionnaire contained in this request. The Statement of Qualifications/Proposal should include the firm name, address, telephone numbers, year established, types of services for which the firm is qualified, any pertinent registration information and references for whom the firm has served as an agent. The individual who would act as the designated agent for the City should also be listed in the proposal. Please submit the **SEALED** proposal to the City Clerk at City of Marceline, Attn: City Clerk, 116 N Main Street USA, Marceline, MO 64658 by **3:00 p.m. on Tuesday, March 5, 2024.**

EVALUATION / PROCEDURE PROCESS

Statements of qualifications and proposals will be evaluated and reviewed by the City Council on Thursday, March 14, 2024. If needed, the Council may request to meet with their top firms/agents. The selected firms will be notified on March 15, 2024 if the Council wishes to meet

with them. The agent and/or firm that best meets the City's needs will be selected as the City's insurance broker/agent. Award is dependent upon successful negotiation of pricing. If the City fails to agree on pricing, the City reserves the right to negotiate with the next most qualified bidder or reject all proposals. The City reserves the unilateral right to reject any or all submissions or parts of submissions, and waive technicalities. This is an equal opportunity event. The successful proposer must be affidavit affirm its enrollment and participation in a federal work authorization program (E-Verify) and will verify the employment eligibility of each employee. Any and all information contained in or submitted with the proposal becomes a public record pursuant to the Missouri Sunshine Law which a contract is executed or all proposals rejected.

EVALUATION CONSIDERATIONS

The City will consider the following items and any additional information it feels necessary to select a qualified firm which best fits the City's needs for health, life, vision and dental insurance broker services.

- Professional status
- Demonstrated successful relationships with other cities
- Ability to meet scheduled deadlines
- Ability to meet budget needs
- Firm's current work load and ability to handle additional work
- Specialized experience and capabilities of the firm
- Demonstrated knowledge of ACA
- Demonstrated experience as an agent for other cities or public entities
- Number of professional personnel
- Number of additional services company can provide to city
- Explanation of firm's approach to work
- Fees
- Services to be contracted
- Knowledge of municipal regulations
- Ability to offer the current plans for the City which is a Missouri Chamber Federation Benefit Plan, Dental Plan through Anthem and Vision Plan through VSP at this time

DUE DATE:

Pease submit the sealed proposal to the City Clerk at 116 N Main Street USA, Marceline, MO 64658 by **3:00 p.m. on Tuesday, March 5, 2024.**

POINT OF CONTACT:

Any questions, clarifications, or requests for general information should be directed to:

Mailing Address

Lindsay Krumpelman
City Clerk
116 N. Main Street USA
Marceline, MO 64658

Contact Information

lindsay.krumpelman@marcelinemo.us
(660) 376-3528

BROKER/AGENT SERVICES QUESTIONNAIRE

Employee Health, Life, Vision and Dental Insurance

Please answer the following questions regarding your agency:

1. What is the name of your agency? Is it incorporated, known by any other name or a dba? Has it ever been known by any other name, and if so what name?
2. What municipal entities do you now represent and for what coverage?
3. Does your agency have contracts with multiple insurance carriers and if so who are they? Do they furnish coverage as requested by the City of Marceline? Is the pricing competitive? How long have you had these contracts and how successful is their performance?
4. What insurance providers would you consider for the coverage as requested by the City of Marceline?
5. What is your educational experience in matters of municipal health, life, dental and vision coverage? Do you carry special rating for insurance with the Insurance Commission for the State of Missouri? Have you ever been subjected to any disciplinary proceedings connected with your agency or with you personally by the Insurance Commission or any other State agency?
6. What is your background / knowledge of the Affordable Care Act?
7. State your objectives if selected by the City of Marceline as its agent. List two objective reasons you believe the City of Marceline should appoint you as its health, life, vision and dental insurance agent.
8. Are you able to offer Missouri Chamber Federation Health Benefit Plans?
9. Are you able to offer VSP vision plans?
10. List all other services that your firm could provide to the City of Marceline.
11. Provide any other pertinent information you would like the City of Marceline to consider in its selection process.