**Huxford Group, LLC**

**Request for Proposals**

**Broker Service**

**(Commercial Insurances and/or Employee Benefits)**

Release RFP – March 31, 2025, 8:00am CST

Deadline for Questions – April 25, 2025, 4:00pm CST

Deadline for Submission – May 9, 2025, 4:00pm CST

Contact information:

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806-350-1732

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P O Box 1854 3120 Eddy St.

Amarillo, TX 79105 Amarillo, TX 79106

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# **INTRODUCTION**

Huxford Group, LLC (Huxford Group)is seeking, from qualified insurance brokers, Broker Services with a consultative approach in finding solutions to insurance challenges. The broker will annually procure health benefits and business insurance policies that are required to carry out Huxford Group’s contract with the Panhandle Regional Planning Commission in the management and operation of Workforce Solutions Panhandle. Respondents must have the experience and qualifications necessary to secure insurance policies such as health insurance, dental coverage, vision coverage, life insurance, workers’ compensation insurance, general liability insurance, errors and omissions insurance, cybersecurity insurance, and fidelity bonding. Proposers will be asked to specify the types of insurance(s) they are qualified to obtain.

This Request for Proposals (RFP) is designed to promote and ensure open, fair and transparent competition to Proposers of any corporate organizational structure (including individuals), provided the Proposer can demonstrate the capacity, experience and relevant background to successfully perform, particularly if they can do so in a cost-effective manner.

# **BACKGROUND**

## Huxford Group, LLC

The companyis contracted to manage and operate Workforce Solutions Panhandle, which delivers workforce and child care services in the Texas Panhandle. The company is a for-profit, equal opportunity employer operating state and federal funded programs, which are administered by the Texas Workforce Commission (TWC) and the Panhandle Regional Planning Commission.

## Governing Authorities

Workforce development and child care program services provided through the service delivery system include, but are not limited to, those funded and governed by the Workforce Innovation and Opportunity Act, Wagner-Peyser Employment Services, Temporary Assistance for Needy Families and Noncustodial Parent/Choices, Supplemental Nutrition Assistance Program Employment and Training, and Child Care grants.

## Current Organization

The current contract beginning on October 1, 2024 through September 30, 2025, Huxford Group is delivering program services to all 26 counties of the Texas Panhandle from offices located at 3120 Eddy Street in Amarillo, 1028-B Megert Center in Borger, and the Amarillo College campus at 1115 West 15th Street in Hereford. Program services are also being provided from a Ford F-450 Recreational Vehicle customized for use as a Mobile Workforce Center. The company employs approximately 60 full-time employees.

# **PART 1 - GENERAL INFORMATION**

## 1.1 **Procurement Standards**

Huxford Group conducts all procurements of goods and services in accordance with and compliance of relevant Office of Management and Budget Circulars, specifically 2 CFR 200, and applicable supplemented final rules promulgated by the Office of the Texas Governor under the Uniform Grant Management Standards (UGMS) and the TWC **Financial Manual for Grants and Contracts**.

1. These guidelines require procurement transactions be conducted in a manner which provides for maximum free and open competition. Additionally, awards may only be made to Proposers who have effectively demonstrated the ability to perform successfully under the terms and conditions of the contract agreement.
2. The TWC **Financial Manual for Grants and Contracts** (FMGC) *Appendix D: FMGC Supplement on Procurement* states:

*“All* procurement transactions must be conducted in a manner providing full and open competition consistent with the standards of Uniform Guidance, Uniform Grant Management Standards, and this Publication.”

## 1.2 Eligibility

Organizations and individuals are eligible to respond if they have adequate experience and the capability to provide the requested services outlined in this RFP. Respondents must also have a proven record of past performance in providing the requested or similar services and not be debarred and/or suspended from conducting business with Federal or State funded agencies. No contract(s) will be awarded to any Respondent(s) that is/are on sanctions during the award phase of the procurement process.

## **1.3 Authorized Huxford Group Contact**

The authorized contact person for this procurement is Jenny Ortega, Human Resources, P.O. Box 1854, Amarillo, Texas 79105; Telephone: (806) 350-1732; and E-mail: [Jortega@wspanhandle.com](mailto:Jortega@wspanhandle.com). Written questions must be submitted before 4:00pm (CST) on Friday, April 25, 2025. Other than the individual stated above, applicants are strictly prohibited from contacting Huxford Group employees for questions.

## **1.4 Issuance and Availability of RFP Packets**

This RFP will be made available at 8:00am (CST) on March 31, 2025 on the Workforce Solutions Panhandle website at [www.wspanhandle.com](http://www.wspanhandle.com). A copy of the RFP may be downloaded by navigating to the *Download Broker RFP* section under the “Open Procurements” section of the “About Us” dropdown. A copy of the RFP can also be obtained at 3120 Eddy Street, Amarillo, Texas 79106 between 8:00am and 5:00pm or by contacting Jenny Ortega, Human Resources, by telephone at (806) 350-1732 or by e-mail at [jortega@wspanhandle.com](mailto:jortega@wspanhandle.com).

## **1.5 Proposal Closing Date and Delivery Method**

The Huxford Group representative must receive responses to this RFP, whether physically or electronically, by no later than:

4:00pm, CST, May 9, 2025

Responses submitted thereafter will not be accepted.

The timely delivery of proposals is the sole responsibility of the Proposer.

Responses may be delivered to Huxford Group, 3120 Eddy Street, Amarillo, Texas

Attention: Jenny Ortega

Or

By email to: jortega@wspanhandle.com

## 1.6 Changes, Amendments, Withdrawal and/or Re-Issuance of this Proposal

Any Respondent may withdraw its bid either in person or by written request at any time. Unless specifically requested by Huxford Group, changes and/or amendments to the originally submitted proposal will not be considered. In addition, Huxford Group reserves the right to:

1. Amend or withdraw this RFP at any time;
2. Extend RFP deadlines;
3. Reject any and all bids; and/or
4. Re-issue this RFP.

## 1.7 Expected Outcome of this Procurement

Huxford Group may award one or more contract(s) for the Broker Services delineated in the Work Requirement area in Part 2 of this RFP. Any contract(s) awarded will be anticipated to be effective July 1, 2025. Huxford Group reserves the right to negotiate for up to three (3) one-year contract renewals, contingent upon satisfactory performance.

## 1.8 Historically Underutilized Business (HUBs)

It is the policy of Huxford Group to continue promoting and expanding economic development for minority, women, and veteran-owned businesses that are located in the Panhandle region. Huxford Group will ensure that local small minority-owned, women-owned, and veteran-owned disadvantaged and State HUB certified businesses are considered in the procurement process whenever possible.

## 1.9 Schedule of Events

The following schedule outlines the dates regarding this RFP. Huxford Group reserves the right to amend this schedule as it deems necessary. If significant changes are made, all prospective Respondents will be notified.

TIMEFRAME

|  |  |
| --- | --- |
| Proposal packets available | Monday, March 31, 2025, 8:00am CST |
| Submission of questions deadline | Friday, April 25, 2025, 4:00pm CST |
| Response to questions | Thursday, May 1, 2025, 4:00pm CST |
| Proposal submission deadline | Friday, May 9, 2025, 4:00pm CST |
| Anticipated contract awarded | Friday, June 13, 2025, 4:00pm CST |

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## 1.10 Process for Appeal

If a Respondent decides to appeal the outcome of the evaluation and or award process, the Respondent may submit a written notice of appeal within fourteen (14) business days of the contract award date. The notice of appeal must be signed, dated, and sent by mail or hand delivered to:

In person Mailed

Trent Morris Trent Morris

President, Huxford Group, LLC President, Huxford Group, LLC

3120 Eddy Street P. O. Box 1854

Amarillo, TX 79106 Amarillo, TX 79105

The President will have ten days to reach a resolution of the appeal.

# **PART 2 – WORK REQUIREMENT**

## 2.1 **Background and Purpose**

The purpose of this RFP is to solicit bids from qualified insurance Brokers who will annually procure insurance policies required to carry out our contract. Huxford Group has a Section 125 Plan and approximately sixty (60) employees.

Huxford Group has federal and state compliance requirements for the procurement of all insurance policies and benefit plans which will require the broker to keep detailed records of its advertisement, procurement and selection process. It will be necessary to show the selection criteria and the rationale used to select each insurance policy.

An important part of the service that Huxford Group is looking for in a Broker is to help us navigate through changes and plan ahead proactively.. We will expect the Broker to assist by providing:

1. knowledge and tools to manage benefits plans, costs, communication strategies, and compliance obligations more effectively;
2. information on changes we will need to make in the near future regarding Health Care Reform; and
3. creative solutions to any particular insurance issues that may arise.

The following insurance policies and benefits are currently in place:

1. Group Insurance (Medical, Dental, Vision, Life/AD&D, Short-Term Disability, and Long-Term Disability);
2. COBRA Administration;
3. General Liability Insurance;
4. Property Insurance;
5. Errors and Omissions Insurance;
6. Cyber Insurance;
7. Fidelity Bond Insurance; and
8. Workers’ Compensation

# **PART 3 - SUBMISSION GUIDELINES**

## **3.1 Submission**

Respondents must submit an offer (proposal) and other supporting documentation in accordance with these instructions. When evaluating a proposal, Huxford Group will consider how the Respondent complied with these instructions. Huxford Group encourages Respondents to contact the authorized Huxford Group contact to request any additional clarification that may be needed to comply with these instructions.

## **3.2 Format**

Each section asks for a document that will be submitted as part of the proposal. These documents are referred to as Item 1 through Item 6.

* + 1. Respondent Background Information. Each proposal submitted shall contain the Respondent’s background information to include a description of the organization along with a history of the organization to determine its business stability, experience, and qualifications of individual(s) who will be responsible for providing the required Broker Services. (Item 1).
    2. Past Performance. Each proposal submitted shall contain a description of the Respondent’s past performance. The Respondent’s past performance in providing Broker Services or services of a similar type and complexity will be evaluated to determine the overall experience in providing this type of service. The Respondent must provide the following information for three (3) agreements for Broker Services or services that are similar in nature and complexity (Item 2);
* Contracting Agency/Company, address, phone number, and point of contact;
* Beginning and ending dates of contract;
* Brief synopsis of work performed; and
* Any other indicators of successful contract performance.

3.2.3 Cost Proposal. Each proposal submitted shall contain a detailed cost proposal which shall include the cost of Broker fees and any other cost associated with the requested Broker Services. Respondents are required to itemize any and all costs that may be associated with the requested service. (Item 3).

3.2.4 Historically Underutilized Business (HUB) Certificate. If the Respondent’s organization is HUB certified, attach a copy of the certificate. (Item 4).

3.2.5 Broker Certification(s). Each proposal submitted shall contain a copy of the Respondent’s Broker Certification(s). (Item 5).

3.2.6 Broker License(s). Each Proposer will include a copy of the Broker License(s). (Item 6).

# **PART 4 - EVALUATION AND SELECTION PROCEDURES**

## **4.1 Evaluation Committee**

A proposal review team will be assigned to evaluate all proposals received by Huxford Group. The review team will use the evaluation criteria as outlined in paragraph 4.2 below. It should be noted that the contract(s) resulting from this RFP will be awarded to the Respondent(s) whose proposal(s), conforming to the RFP, is determined to provide the best evaluated response.

## **Evaluation Criteria and Rating Scale**

The following criteria will be used to evaluate each proposal. Each response will be awarded a numerical rating based on the information provided by the Respondent, up to the maximum number of points indicated for each area of consideration.

4.2.1 Responsiveness (Maximum 10 Points)

1. Were appropriate attachments requested in the RFP provided, and were the documents requiring signatures signed?
2. Did the Respondent follow the required format to submit the response to this RFP?

4.2.2 Respondent Background Information (Maximum 35 Points)

1. Did the Respondent provide sufficient background information to determine if the organization demonstrates business stability?
2. Did the Respondent provide qualifications of individuals who would be responsible for providing the requested Broker Services, and did the information reflect adequate experience in performing this type of service?
3. Did the Respondent provide a brief description of the organization’s Board of Directors, Principals and/or Chief Officers, their education and relevant experience, and did the proposal demonstrate adequate experience and education to perform these services [i.e., five (5) years minimum experience]?

4.2.3 Past Performance (Maximum 35 Points)

All responses will be reviewed for the demonstration of successful past performance.

1. Did the Respondent provide information for three (3) contracts establishing past experience and performance relating to Broker Services similar in nature and complexity to those sought by Huxford Group?
2. Did the information on the three (3) contracts include the Contracting Agency/Company, address, telephone number, and point of contact; the beginning and ending dates of the contracts; a brief synopsis of the work performed; and other indicators of successful past contract performance? Did these indicators demonstrate successful performance in carrying out services Huxford Group is seeking?
3. Were the Broker Services provided similar in nature to the services requested in this RFP?

4.2.4 Cost Analysis (Maximum 20 Points)

All responses will be rated as to reasonable and necessary costs. Itemization and a detailed explanation of all costs are required.

1. Are all costs associated with the requested Broker Services clearly stated?
2. Did the proposal include a detailed schedule of charges in addition to the Broker fees, if any?
3. Are the costs reasonable (i.e., does the Respondent’s proposed cost compare well to the costs offered by other Respondents or to what is reasonable for the local market)?

4.2.5 Historically Underutilized Businesses (HUB) (One (1) Bonus Point)

A Respondent that is State HUB certified and has provided the organization’s State HUB Certification Number included with the copy of the State HUB Certificate (Item 4) will be awarded one (1) bonus point.