



REQUEST FOR QUALIFICATIONS BASED PROPOSALS

PROPOSAL NUMBER: 22-23-05

Dental Insurance

Human Resources

Return Sealed Proposals to:

SAN JUAN COUNTY
Central Purchasing Office
213 S. Oliver Drive
Aztec, NM 87410

Attn: Jaime Jones
Contract Analyst
Phone: 505-334-4548
E-Mail: jjones@sjcounty.net

CLOSING DATE: September 1, 2022
TIME: 5:00 p.m. (Local Prevailing Time)

NIGP Commodity/Services Codes: 953-48 Dental Insurance

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- **Proposal of Offeror Form must be completed in full and returned with the Proposal Offer.**
 - This proposal is subject to the Terms and Conditions shown on the following pages and any/all additional instructions.
 - Do not return the Request for Proposal (RFP) in case of "No Response".
 - Proposal must be received in the County's Central Purchasing Office by the Proposal Closing Date and Local Time as indicated above. **Any proposal received after the specified time and/or date will not be accepted and will be returned to the sender unopened. Emailed Proposals will not be accepted.**
 - **Proposals shall be submitted sealed. The outside package should clearly identify the Project Name, Proposal Number, Proposal Closing Date and Name of Offeror. Submit Proposal Offer in accordance with the Request for Proposal.**

Failure to complete the proposal documents in accordance with all instructions provided is cause for this office to reject the proposal.

THE PROCUREMENT CODE SECTIONS 13-1-28 THROUGH 13-1-99 NMSA 1978, IMPOSES CIVIL AND CRIMINAL PENALTIES FOR ITS VIOLATION. IN ADDITION, THE NEW MEXICO CRIMINAL STATUTES IMPOSE FELONY PENALTIES FOR BRIBES, GRATUITIES AND KICKBACKS.

ACKNOWLEDGEMENT OF RECEIPT FORM

PROPOSAL NO.: 22-23-05

Dental Insurance

18 PAGES (INCLUDING ACKNOWLEDGEMENT AND CAMPAIGN DISCLOSURE FORM) EXCLUDING ATTACHMENTS 1-5.

Please submit the Acknowledgement form to jjones@sjcounty.net and attachments will be emailed to you.

NOTE: ONLY POTENTIAL OFFERORS WHO COMPLETE AND RETURN THIS FORM WILL RECEIVE COPIES OF ADDENDUMS, IF ISSUED.

PROPOSAL INFORMATION:

In acknowledgement of receipt of the above referenced Proposal Packet, the undersigned agrees that he/she has received a complete copy.

OFFEROR NAME

SIGNATURE OF AUTHORIZED REPRESENTATIVE

PRINTED NAME OF AUTHORIZED REPRESENTATIVE

ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE: _____

PHONE NO.: _____

E-MAIL: _____

RETURN TO:
Jaime Jones
Contracts Analyst
SAN JUAN COUNTY
(505) 334-4548
jjones@sjcounty.net

**Emailed copies of the Acknowledgement of Receipt Form will be accepted.
Emailed Proposal responses will not be accepted.**

SEQUENCE OF EVENTS

The Chief Procurement Officer will make every effort to adhere to the following schedule:

<u>Action</u>	<u>Responsibility</u>	<u>Date</u>
1. Issue of RFP	San Juan County	08/10/2022
2. Deadline to Submit Questions	Offerors	08/25/2022 @ 5:00 pm
3. Response to Written Questions	San Juan County	08/29/2022
4. Submission of Proposal (5:00 pm Local Prevailing Time (atomic clock))	Offerors	09/1/2022
5. Proposal Evaluation	Evaluation Committee	September 2022
6. Evaluation Committee Recommendation/ Approval of Award by SJC Commission	San Juan County	September 2022
7. Execution of Contract	SJC/Offeror	October 2022

EXPLANATION OF EVENTS

The following paragraphs describe the activities listed in the sequence of events shown above.

1. Issue of RFP

This RFP is being issued by San Juan County Central Purchasing Office.

2. Deadline to Submit Questions

Potential Offerors may submit written questions as to the intent or clarity of this RFP until close of business on **August 25, 2022**. All written questions must be addressed to Jaime Jones, Contract Analyst, jjones@sjcounty.net.

3. Response to Written Questions

Written responses to written questions and any RFP addendums will be distributed on **August 29, 2022** to all potential Offerors who have submitted the Acknowledgement of Receipt form. Potential Offerors may return the Acknowledgement form by hand, mail, or email. Potential Offerors who fail to submit this form will **not** automatically receive any addendums, if issued, or correspondence regarding this RFP.

4. Submission of Proposal

All proposal responses must be received for review and evaluation by San Juan County Central Purchasing no later the **5:00 pm (Local Prevailing Time (atomic clock)) on September 1, 2022**. Proposals received after this deadline will not be accepted. The date and time will be recorded on each proposal. Proposals must be addressed and delivered to the Chief Procurement Officer at **213 S. Oliver Dr., Aztec, NM 87410**. Proposals must be sealed and labeled on the outside of the package to clearly indicate that they are in response to **Proposal 22-23-05, Dental Insurance**.

Pursuant to Section 13-1-116 NMSA 1978, the contents of any proposal shall not be disclosed to competing Offerors prior to contract award.

5. Proposal Evaluation

The evaluation of proposals will be performed by an evaluation committee appointed by the

Central Purchasing Office. This process will take place during the month of **September 2022**. During this time, the Chief Procurement Officer may initiate discussions with Offerors who submit responsive or potentially responsive proposals for the purpose of clarifying aspects of the proposals, but proposals may be accepted and evaluated without such discussion. Discussions SHALL NOT be initiated by the Offerors.

The evaluation committee shall rank each responsive proposal according to the numerical score achieved by the Offeror according to the criteria. A responsive Offeror with the most highly ranked proposal will be recommended to the Board of County Commissioners or its delegate for further consideration.

6. Evaluation Committee Recommendation / Approval of Award by SJC Commission

San Juan County anticipates awarding the contract in **September 2022**. This date is subject to change at the discretion of the County. The contract award by the Board of County Commissioners or its delegate is subject to successful negotiation of the cost of services with the most highly ranked Offeror. No contract will be awarded if fair and reasonable compensation cannot be agreed to.

7. Execution of Contract

The contract will be finalized with the highest ranked Offeror in **October 2022**. If an agreement cannot be reached with the most highly ranked Offeror, negotiations will be terminated with that Offeror, and negotiations undertaken with the second most highly ranked Offeror. If negotiations are successful with any Offeror, the County shall publicly announce the name of the Offeror selected for award.

8. Right to Protest

Any protest by an Offeror must be timely and in conformance with Section 13-1-172 NMSA 1978 and applicable procurement regulations. Protests must be written and must include the name and address of the protester and the RFP number. It must also contain a statement of grounds for protest including appropriate supporting exhibits. The protest must be delivered to:

San Juan County
Central Purchasing
Diana Chapman, Chief Procurement Officer
213 S. Oliver Dr.
Aztec, NM 87410

TERMS AND CONDITIONS (Unless otherwise specified)

1. **GENERAL.** When the County Chief Procurement Officer issues a purchase document in response to the Offeror proposal, a binding contract is created.
2. **FORM OF SUBMISSION.** Each proposal shall be typewritten on standard 8 ½" x 11" paper and placed within a binder with tabs delineating each section. One (1) original and five (5) copies of the Proposal shall be supplied. **Only one Proposal may be submitted by each individual Offeror. Proposals shall be submitted sealed. The outside package should clearly identify the Project Name, Proposal Number, Proposal Closing Date and Name of Offeror.**

In addition to the above requirements, the Offeror must provide one (1) electronic copy organized in the format requested with each tab's information as a separate file on a Flash Drive in one of these formats: Adobe PDF (pdf), Microsoft Word (doc), or Microsoft Excel (xls). The electronic copy must be organized and laid out in the same format as outlined in Contents of Proposal Offer, pgs. 8-9, with each tab as a different folder.

3. **DEBARRED OR SUSPENDED CONTRACTORS.** A business (contractor, subcontractor or supplier) that has either been debarred or suspended pursuant to the requirements of §13-1-177 through §13-1-180, and §13-4-11 through §13-4-17 NMSA 1978 as amended, shall not be permitted to do business with San Juan County and shall not be considered for award of the contract during the period for which it is debarred or suspended.
4. **CONFLICT OF INTEREST.** The successful Offeror covenants that neither it nor its officers, directors, agents and employees, have any interest and shall not acquire any interest, direct or indirect, financial or otherwise, which would conflict in any manner or degree with the performance of the required services.
5. **AMENDMENT.** An Offeror may submit an amended proposal before the due date and time. An amended proposal shall be complete, as it will be substituted for the earlier proposal(s), and shall be clearly identified as an amendment. The County will not merge, collate or assemble proposal materials.
6. **WITHDRAWAL.** An Offeror may withdraw its Proposal at any time prior to the deadline for receipt of proposals. An Offeror desiring to withdraw a proposal shall submit a written request to the Bid/Contract Administrator signed by the Offeror's duly authorized representative(s).
7. **PROPOSAL OFFER FIRM.** Responses to the RFP, including costs, shall be firm for ninety (90) days after the due date for receipt of proposals.
8. **COST OF PREPARING RFP.** Any cost incurred by the Offeror in preparation, transmittal, or presentation of any proposal or material submitted in response to this RFP shall be borne solely by the Offeror.
9. **CONFIDENTIALITY.** Each proposal will be kept confidential until a contract is awarded. Following award of a contract, all documents pertaining to each proposal shall be open for public inspection, except for any material, which is designated by the Offeror as proprietary or confidential. Proprietary or confidential data is normally restricted to confidential financial information concerning the Offeror's organization and data that qualifies as a trade secret in accordance with the Uniform Trade Secrets Act, 57-3A-1 to 57-3A-7 NMSA 1978. The price of products offered or the cost of services proposed shall not be designated as proprietary or confidential information. The County will not disclose or make public any pages of a proposal on which the Offeror has stamped or imprinted "proprietary" or "confidential." Such data shall be readily separable from the proposal in order to facilitate eventual public inspection of the non-confidential portion. If a citizen of this State requests disclosure of data for which an Offeror has made a written request for confidentiality, the Central Purchasing Department shall examine the Offeror's Proposal and make a written determination which specifies which portions of the proposal should be disclosed in accordance with applicable New Mexico law. Unless the Offeror takes action to prevent the disclosure, the proposal will be so disclosed. The proposal shall be open to public inspection subject to any continuing prohibition on the disclosure of confidential data.
10. **PUBLICATION.** Offeror shall secure from the County written approval prior to publication of any information that pertains to the potential work or activities, which are solicited in this procurement.
11. **LEGAL REVIEW.** Since Offerors will be bound by the specifications, terms and conditions herein, it is

strongly recommended that each Offeror obtain legal advice concerning the proposal.

12. **GOVERNING LAW / VENUE.** The laws of the State of New Mexico shall govern this procurement and any resulting contract. Any action to enforce terms and conditions herein shall be brought only in the Eleventh Judicial District Court, San Juan County, State of New Mexico.
13. **CONTRACT DOCUMENTS.** The Contract Documents shall consist of this Request for Proposal, the Response of the successful Offeror, a separate written contract and the County's Purchase Order.
14. **CONTRACT TERMS AND CONDITIONS.** A fixed fee contract between the County and the successful Offeror shall follow the format specified by the County. The County reserves the right to impose, as it sees fit, additional terms and conditions upon the successful Offeror, should conditions warrant. The contents of this RFP, as revised and/or supplemented, and the successful Offeror's proposal, will be incorporated into and become part of the contract.

Should an Offeror object to any of the County's terms and conditions, as contained in the document, that Offeror shall propose specific alternative language that would be acceptable to the County. General references to the Offeror's terms and conditions, or attempts at complete substitutions *are not* acceptable to the County and will result in disqualification of the Offeror's proposal. The Offeror shall provide a brief explanation of the purpose and impact, if any, of each proposed change, following by the specific proposed alternate wording.

Any additional terms and conditions, which may be the subject of negotiation, will be discussed only between the County and the selected Offeror and shall not be deemed an opportunity to amend the Offeror's proposal.

15. **CONTRACT AMENDMENTS.** The County reserves the right to make changes or revisions to the scope of work as required during the term of the contract if it determines it to be necessary or desirable. No changes, revisions, modifications, or amendments of any of the terms or conditions of the contract specifications and requirements shall be valid unless reduced to writing by the County. Verbal discussions or agreements shall not bind the County.
16. **TERMINATION OF CONTRACT.** In case of a breach on any provision of a contract, the County reserves the right to terminate the contract, procure the services from other sources, or take other steps, as it deems appropriate. Additionally, the County reserves the right to cancel a contract at any time, for any reason, without penalty, by giving at least thirty (30) days written notice to the successful Offeror. Written notice shall be deemed delivered when deposited in the United States Mail and certified.

In addition, any contract awarded as a result of the Request for Proposal may be terminated if sufficient appropriations or authorizations do not exist. The County's decision concerning whether sufficient appropriations or authorizations exist will be final.

17. **SPECIFICATIONS.** It is the intent of the County to make this Request for Proposal in such a manner as to be open to all qualified Offerors. Any specification that tends to limit or eliminate a qualified Offeror shall be brought to the attention of the County not less than ten (10) days before the date when responses are due. Failure to bring such a matter to the attention of the County shall bar the Offeror from asserting a later claim in this regard.
18. **INDEMNITY.** The Offeror awarded the contract agrees, as material consideration for this Agreement, to defend, indemnify, and hold harmless the County, its Elected Officials, agents, and employees from and against any and all claims arising out of any asserted negligent act, error or omission of the Offeror, its officers, directors, employees or agents or arising in any way from this agreement or the Offeror's activities hereunder. The indemnity agreed to in this paragraph shall not extend to liabilities, claims, damages, losses or expenses, including attorney fees arising out of: The preparation or approval of maps, drawings, opinions, reports, surveys, change orders, designs or specifications by the County, or the agents or employees of the County, or the giving of or the failure to give directions or instructions by the County, or the agents or employees of the County, where such giving or failure to give directions or instructions is the primary cause of bodily injury to persons or damage to property.
19. **LICENSING.** The Offeror awarded the contract shall possess a current license in the State of New Mexico, and shall obtain and hold such additional licenses as are reasonably required to accomplish his or her duties under this Agreement.

20. **STATUS OF OFFEROR.** The successful Offeror and its officers, directors, agents and employees, are

independent contractors performing services for the County and are not employees of the County. The Offeror and its officers, directors, agents and employees, shall not accrue leave, retirement, insurance, bonding, use of County vehicles, or any other benefits afforded to employees of the County. The Offeror shall perform his/her obligations under this Contract as necessary and appropriate under all Federal, State, and local laws, codes, ordinances, rules, regulations, and standards applicable to this type of service. The County will not supervise the Offeror in the day-to-day performance of this Contract.

- 21. DISCRIMINATION / EQUAL EMPLOYMENT OPPORTUNITY / CIVIL RIGHTS.** The successful Offeror shall be an equal opportunity employer, and shall not discriminate with regard to race, age, religion, color, national origin, ancestry, sex, sexual orientation, gender identity, spousal affiliation, physical or mental handicap or serious medical condition as specified in N.M.S.A. 1978, §§ 28-1-7 (as amended) in the performance of this contract. The successful Offeror agrees to abide by all Federal and State laws, rules, and regulations pertaining to equal employment opportunity, discrimination, and civil rights.
- 22. NOTICE.** The New Mexico Procurement Code, N.M.S.A. 1978, §§ 13-1-28 through 13-1-199, imposes civil and criminal penalties for its violation. In addition, the New Mexico Criminal Statutes impose felony penalties for illegal bribes, gratuities and kickbacks.
- 23. TAXES.** The Offeror awarded the Contract shall be responsible for the payment of all federal, state, and local taxes on monies received pursuant to this Agreement.
- 24. ASSIGNMENT.** An Offeror shall not transfer, sell, assign, sublicense, pledge or otherwise dispose of in any way its interest in any contract which may result from this solicitation, or assign any claims for money due or to become due under any contract, without having first obtained the prior written consent of the County to do so. Any attempt by an Offeror to do any of the foregoing without such consent shall be null and void, and may result in disqualification of the Offeror or termination of any contract resulting from this solicitation. The County's consent to any of the foregoing shall not constitute consent to any other act, nor shall such consent relieve the Offeror from any of its duties to perform all agreements, covenants, and conditions set forth in this solicitation or any resulting contract.
- 25. RECORDS.** All records and documents are property of San Juan County and shall be returned to San Juan County upon termination of any contract.
- 26. PERFORMANCE BOND.** The County reserves the right to require a performance bond from the Offeror awarded a contract if deemed to be in the best interest of the County. The bond shall be acquired and paid for by the Offeror and shall be in form satisfactory to the County.
- 27. CODES LAWS / REGULATIONS.** The successful Offeror shall be properly licensed and shall meet and comply with all applicable Federal, State, and local government codes, laws, regulations, and requirements in the performance of the work described herein.
- 28. INSURANCE.** The successful Offeror is required to carry and maintain during the period of the contract General Liability, Auto and Workman's Compensation insurance from an insurance company or companies with a Best Rating of A, or better, licensed to do business in the State of New Mexico and admitted by the Department of the State of New Mexico. At a minimum, each Offeror must carry comprehensive General Liability Insurance and Automobile Insurance with combined single limits of not less than \$1,000,000.00 and Workman's Compensation in amounts as required by the New Mexico Workers Compensation Act. The successful Offeror must also carry and maintain during the period of the contract Errors and Omissions Insurance coverage (Professional Liability Insurance) with limits of not less than \$1,000,000.00, from an insurance company or companies with a Best Rating of A, or better.

Each Offeror is asked to submit a Certificate of Insurance, commensurate with the above requirements, along with their proposal Offer. The Offeror selected for an award under this solicitation shall provide the appropriate certificates of insurance to the County prior to award of a contract. The County shall be named as an Additional Insured on the General Liability policy required by this section.

CONTENTS OF PROPOSAL OFFER

The proposal Offer submitted by the Offeror shall, at a minimum, contain the following:

To be considered for award of a contract pursuant to this request for proposals, each proposal Offer shall contain the materials required herein, and comply with the format described. The Offer shall contain a response to the specifications and requirements, and address other items which may be identified within the Evaluation/Award section. Failure to provide required documentation and information as requested may result in rejection of the Offeror's Proposal.

PROPOSAL FORMAT/CONTENTS.

The proposal must be organized and indexed in the following format and must contain, **at a minimum**, all listed items in the sequence indicated:

SECTION 1. TRANSMITTAL / COVER LETTER.

- 1) IDENTIFY THE OFFEROR AND CONTACT PERSON. Offeror shall identify the organization submitting the proposal, and shall further identify its organizational structure (e.g. sole proprietorship, corporation, etc.), whether the organization is authorized to do business in the State of New Mexico, and where the organization is based, where its principal place of business is located and, if a corporation, where it is incorporated. Offerors shall include the names, titles and telephone numbers of persons whom the County may contact for clarification or further information.
- 2) BIND THE OFFEROR. Each Offeror shall identify, by title and/or position, the person authorized by the organization to enter into a Contract with the County. That person shall sign the proposal. If written authority exists (such as corporate minutes), a copy of that document shall be attached. The Proposal shall bind the organization to complete the work described in the Request for Proposal.
- 3) ACCEPTANCE OF TERMS. Each Proposal shall explicitly indicate the organization's acceptance of the additional terms and conditions set forth in this Request for Proposal. If the organization proposes alternative terms and conditions, it shall set each out with specificity in its Proposal. The County will not be obligated to accept any such terms and conditions and may consider submission of it to be an exception.

SECTION 2. REQUIRED FORMS.

The following forms are required and must be signed by an authorized representative, when applicable.

- A. Proposal of Offeror Form. Offeror shall acknowledge receipt and acceptance of any and all addendums.
- B. Current Certificate of Insurance.
- C. Campaign Contributions Disclosure Form.
- D. New Mexico Resident Business/Veterans Certificate. Pursuant to section 13-1-21 NMSA 1978, to be considered for the 5% resident preference, the Offeror shall include its in-state resident preference number and a copy of the Certificate provided to it by the New Mexico Taxation and Revenue Department.

Pursuant to Sections 13-1-21 and 13-1-22 NMSA 1978, effective July 1, 2012, to be eligible for the 10% resident veterans' preference, the Offeror shall include a copy of the resident veterans preference certificate provided to the Offeror by the New Mexico Taxation and Revenue Department. This preference is separate from the in-state preference and is not cumulative with that preference.

All Offerors/Contractors may apply for a resident veterans' preference number with the State of New Mexico Taxation and Revenue Department. For questions, please call the New Mexico Taxation and Revenue Department at 505-827-0951.

CRITERIA.

New Mexico Business/Veterans Preference

POINTS.

+10% of Total Points

Points will be awarded based on Offeror's ability to provide a copy of a current Resident Business

Certificate or Resident Veterans Certificate.

In addition, the attached Resident Veterans Preference Certification form must be completed, signed and be included in the proposal submission.

SECTION 3. INTRODUCTION AND BACKGROUND.

Each Offeror shall provide an Overview of current and prior experience in work comparable to the scope of services required in this Request for Proposals.

SECTION 4. QUALIFICATIONS OF PRINCIPAL PERSONNEL.

Background, qualifications, education, training and years of experience of key personnel to be involved in these services shall be included. Identify special skills or strengths of key personnel. Include qualifications for any subcontractor the Offeror has indicated to be part of this Response to Proposal. Include all areas of work that are to be performed by the subcontractor(s).

SECTION 5. REFERENCES.

Offeror must submit three (3) external corporate references from clients who have received similar services to those proposed by the Offeror for this contract, especially those projects in the public sector that have occurred within the past five (5) years. Each reference must include the name of the company, company current address, name of the contact person, telephone number, and the date and description of the services provided.

SECTION 6. RESPONSE TO SPECIFICATIONS AND REQUIREMENTS.

Each Proposal shall contain a written response to the specifications and requirements as identified throughout this Request for Proposal, including a response to other items identified in the Evaluation/Award section. If an Offeror is unable to provide an item or service, which is required by the specifications, it shall take written exception to the specification. The Offeror's Proposal must be as detailed and specific as possible.

SECTION 7. COST PROPOSAL.

Each Offeror shall provide a cost proposal with its Offer. The Offeror's pricing shall be inclusive of any additional costs necessary in providing the services, if applicable, (i.e. travel time, mileage, supplies, etc.).

Prices, which are offered and accepted pursuant to this solicitation, shall be firm and fixed for the initial term of the contract.

SECTION 8. CUSTOMER SERVICE/ADDITIONAL SERVICES.

Each Offeror shall provide information relative to their ability to provide customer service and account representation, as well as an overview of any additional services such as cost containment practices, and organizational tools, etc.

SECTION 9. OTHER SUPPORTING OR RESOURCE MATERIAL.

Offerors are encouraged to thoroughly describe any other value-added services they feel may contribute to the success of the project.

DENTAL INSURANCE

INTRODUCTION

The County of San Juan, New Mexico (hereafter “the County”), and its subsidiaries, are soliciting Requests for Proposals for providing ASO (Administrative Services Only) dental coverage that includes providing the network, calculated plan premiums, and plan design enhancements with Tall Tree Administrators as the TPA; **and** the County is seeking quotes on switching to a FI (Fully Insured) Dental model for Employees and Qualified Dependents.

GENERAL INFORMATION AND CURRENT PLAN INFORMATION.

The County currently employs approximately 620 San Juan County employees; 48 San Juan County Communication Authority employees; and 1 Criminal Justice Training Authority employee.

The County’s current Third-Party Administrator (TPA), Tall Tree Administrators. If your proposal is for ASO services only you must be able to integrate with this provider.

Utilization Management and Pre-Certification services are currently being provided by Cigna; Cigna provides the Preferred Medical Network Services. Serve You Rx provides Pharmacy Benefit Management services.

Newly hired employees are eligible for coverage under County employee benefit programs on the 1st day of the sixth (6th) full pay period which equates to 70 days. Please note that the date of eligibility will not usually fall on the first (1st) day of the month and will always be a Sunday.

Employees may be added periodically off cycle based on eligible life events per Section 125 of the Internal Revenue Code. Full benefits are based on a 30-hour work week.

Employees that separate from the County will be offered COBRA. Coverage is prorated for the first month as regular coverage terminates at midnight the last day employed.

The State of New Mexico has a health program available for government retirees who are receiving their pension through the New Mexico Public Employee Retirement Administration, so the County does not cover retired personnel.

Our plan is a Comprehensive Plan. \$1,500 individual limit with \$50 deductible. The summary is attached. We would like to see the quoted price for this plan as well as see plans offered at current industry standard. Please include different tiered options.

CONTRACT TERM / RENEWAL.

The current self-insured program is contracted and budgeted for the fiscal year term of July 1, 2022, through June 30, 2023; with enrollees covered through December 31, 2022. It is therefore proposed and requested that the initial term of the policy be for one (1) year in length, effective **January 1, 2023, through December 31, 2023**, for the calendar year enrollment period. The contract may, upon mutual agreement of the parties, be renewed for up to three (3) additional one-year terms. The primary term and all one-year renewal options shall not exceed four-years (Section 13-1-150 NMSA). The contract may also be renewed for a period less than one full year.

A premium adjustment shall be considered on the fiscal year term for calendar year implementation but only after the initial term of the contract and shall only be permitted if there are necessary changes to the account for changes in the County’s loss experience and/or to account for market factors in the insurance industry if the parties mutually agree upon an acceptable form of increase.

The County requires that a formal renewal notice, or cancellation notice (if applicable), for coverage, be received no later than 120-days prior to the renewal date of the policy.

The price adjustment, if required, shall not be more than the annual average percentage increase in the Consumer Price Index (CPI), All Urban Consumers, Series ID CUUR0400SAM, Area: West, Item: Medical Care.

REQUIREMENTS AND SPECIFICATIONS.

The proposal must be as specific as possible and address the following specifications and requirements. In addition, the Offeror shall provide itemized, detailed pricing for the specified services as requested with their response.

The Offeror shall:

1. Disclose all commissions, compensations, and fees paid to insurance agents, brokers, or other parties in their Proposal and disclose all costs required to establish and ASO and FI plan.
2. Define how claims shall be administered in an FI option. In an ASO option, claims shall be processed through Tall Tree, please outline process.
3. Provide detailed responses to the following questions and requests for information with as much specificity as possible.
 - a. Cost (Complete Cost Quotation Form):
 - i. Administrative Fees
 - ii. Proposed Plan Premiums
 - iii. Commissions.
 - iv. Rate Guarantee (two years is preferred)
 - v. Any agent or implementation fees
 - b. Policy terms and conditions.
 - c. Company Information:
 - i. Head Quarter address, Service address (if different).
 - ii. Company ratings, strength, and stability.
 - iii. Allocated and assigned personnel and team for account.
 - d. List of clients with similar size and needs of San Juan County. We reserve the right to contact references.
 - e. Experience in the field and years in business.
 - i. Customer service days and hours of operation and contact information.
 - f. Outline enrollment and disenrollment process.
 - g. Outline invoicing and claim processing – ability to work with Tall Tree Administrators required.
 - h. Outline enrollee / member capabilities through resources like online portals
 - i. Outline thoughts on supplemental carriers.
 - j. Identify any perk benefits or additional benefits offered through service.

ATTACHMENTS.

Please submit the Acknowledgement form to jjones@sjcounty.net and attachments will be emailed to you.

- Attachment #1 – Fully Executed Plan Document and Plan Summary
- Attachment #2 – 24-month claim history
- Attachment #3 – Census
- Attachment #4 – Rate history
- Attachment #5 – Participating provider list

THIRD PARTY ADMINISTRATION

The County utilizes Tall Tree Administrators to track signed provider dental agreements as sent and process all dental claims as received.

The third-party administrator provides the following services:

- Process and Payment of Claims
- Third Party Fee Payment Processing
- Reporting Services
- Upkeep of Plan Document

EVALUATION / AWARD.

Responsive proposals will be evaluated in the following manner. Any proposal that is incomplete or deficient may be rejected before evaluation. Failure of an Offeror to respond to criteria set forth in this RFP document may result in a score of Zero (0).

- A. **EVALUATION COMMITTEE.** Each responsive proposal shall be evaluated by an Evaluation Committee comprised of San Juan County personnel or representatives appointed by the County Purchasing Office.
- B. **EVALUATION CRITERIA.** The Evaluation Committee shall evaluate each responsive proposal according to the following criteria/points:

<u>CRITERIA.</u>	<u>POINTS.</u>
COST OF COVERAGE / PREMIUMS The cost associated with the services to be performed under this proposal.	350
RATE GUARANTEES / POLICY TERM	150
QUALIFICATIONS Qualifications, capacity and capability of the business, including any consultants, their representatives, qualifications and locations, to perform the work, including any specialized services.	200
EXPERIENCE WITH COMPARABLE CLIENTS / REFERENCE CHECKS Offerors experience with providing consulting services related to dental benefits to other public sector clients. (100 pts) Offeror's references of clients who have received similar services to those proposed by the Offeror for this contract, especially those projects in the public sector that have occurred within the past five (5) years. (100 pts)	200
OTHER PLAN BENEFITS OFFERED / CUSTOMER SERVICE	50
QUALITY AND COMPLETENESS OF PROPOSAL	50
UP TO ADDITIONAL 100 POINTS TO BE ADDED FOR IN STATE AND/OR VETERANS PREFERENCE	<u>100</u>
TOTAL:	<u>1100</u>

- C. **METHOD FOR EVALUATING THE COST PROPOSAL:** Price offered is responsive to the RFP requirements and instructions and is realistic in respect to specifications and requirements. The Cost Score will be evaluated using the following equation.

$$\frac{\text{Price of Lowest Offeror} \times \text{Maximum Price Score (350)}}{\text{Price of this Offeror}} = \text{Price Score of this Offeror}$$

- D. **EVALUATION PROCESS.**

The Evaluation Committee shall evaluate each responsive proposal according to the above criteria. The evaluation process will follow the major steps outlined below:

1. Preliminary Proposal Review: All proposals received will be reviewed for compliance and satisfactory response to RFP requirements. Non-conforming/non-responsive proposals will be eliminated from further consideration at this step.
2. Selection of highest ranked Offeror: The Evaluation Committee will evaluate, score, and rank proposals to select the highest ranked Offeror.

3. Oral Presentation/Interview: Top ranked Offerors may be given the opportunity to make oral presentations or be interviewed, if deemed necessary to San Juan County's Evaluation Committee.
4. Highest ranked Offerors may be given the opportunity to submit a "Best and Final" Offer, with consideration of a combined award with Request for Proposal, 22-23-06 Vision Insurance.
5. Final Evaluation (initial scoring re-evaluated, existing evaluation criteria used), Selection and Notification.

E. COMMITTEE'S RECOMMENDATION. The Evaluation Committee shall rank each responsive proposal according to the numerical score achieved by the Offeror after evaluation according to the criteria. A responsive proposal from the most highly ranked Offeror will be recommended to the Board of County Commissioners or its delegate for further consideration.

F. NEGOTIATION. Award of a contract by the Board of County Commissioners or its delegate is subject to successful negotiation of the cost of services with the most highly ranked Offeror. No contract will be awarded if fair and reasonable compensation cannot be agreed to. If an agreement cannot be reached with the most highly ranked Offeror, negotiations will be terminated with that Offeror, and negotiations undertaken with the second most highly ranked Offeror. If an agreement cannot be reached with the second most highly ranked Offeror, negotiations will be terminated with that Offeror and negotiations undertaken with the third most highly ranked Offeror, and so on pursuant to N.M.S.A. 1978 § 13-1-122. If negotiations are successful with any Offeror, the County shall publicly announce the name of the Offeror selected for award.

G. INVESTIGATIONS. The County may, at its option, contact a given Offeror for clarification of its proposal or for additional information. The Offeror(s) SHALL NOT initiate discussions with the County. The County may make such investigations as necessary to determine the ability of the Offeror to meet the specifications and adhere to the terms and conditions set forth within this Request for Proposals and in the accompanying documents. The County will reject the proposal of any Offeror who is not a "responsible Offeror" as that term is defined in N.M.S.A. 1978. §§ 13-1-83.

H. RIGHT TO DISCONTINUE PROCUREMENT. The County reserves the right to waive minor irregularities in an Offeror's proposal. The County also reserves the right to waive mandatory requirement(s) so long as all responding vendors fail to meet the mandatory requirement(s) and the failure to do so does not otherwise materially effect the procurement. The County reserves the right to cancel this Request for Proposals at any time, and to reject any or all proposals, or otherwise to proceed in the best interests of the County. This Request for Proposals in no manner obligates the County or any of its agencies to the eventual purchase of any product or service, whether explicitly described or implied herein, until confirmed by a written contract and/or Purchase Order.

I. QUESTIONS / SUGGESTIONS. Questions and/or suggestions concerning this Request for Proposal shall be submitted in writing no later than seven (7) days prior to the Proposal Closing Date and shall be directed to:

Jaime Jones, Contract Analyst
(505) 334-4548 E-Mail: jjones@sjcounty.net

Offerors are specifically notified that any attempt to contact any person other than the party listed above concerning this procurement, shall be cause to reject said respondent(s) from further consideration.

Note: Information provided in this Request for Proposals shall only be used for the purpose of submitting a Proposal Offer to the County and shall not be used, released, or disclosed for any other purpose or use.

PROPOSAL OF OFFEROR

THIS FORM MUST BE COMPLETED AND RETURNED BY ALL OFFERORS

*** Do not reference another section within your Proposal Offer as a response.**

The following proposal is made for furnishing the following service for San Juan County, New Mexico.

Request for Proposal #22-23-05 Dental Insurance

The undersigned declares that the amount and nature of the service to be furnished is understood and that the nature of this proposal is in strict accordance with the conditions set forth and is a part of this Proposal, and that the undersigned Offeror has read and understands the specifications and conditions of the Proposal.

The undersigned, in submitting this proposal, represents that the Offeror is an equal opportunity employer, and will not discriminate with regard to race, age, religion, color, national origin, ancestry, sex, sexual orientation, gender identity, spousal affiliation, physical or mental handicap or serious medical condition as specified in N.M.S.A. 1978, §§ 28-1-7 (as amended) in the performance of this contract.

The undersigned hereby proposes to perform necessary professional services upon the conditions stated in this proposal after notice of award and execution of a contract.

- If applicable, acknowledges receipt of the following Addendum(s):

Addendum No: _____ Date: _____ Addendum No: _____ Date: _____

Addendum No: _____ Date: _____ Addendum No: _____ Date: _____

Respectfully submitted,

By (Individual authorized to contractually bind the Offeror):

(Printed Name)

(Signature)

(Title)

(Date)

(Offeror/Contractor Name)

(Street Address)

(City, State & Zip Code)

(E-Mail Address)

(Phone No.)



Terri Fortner, Chairman
Steve Lanier, Commission Pro-Tem
John Beckstead, Commissioner
Glojean Todacheene, Commissioner
Michael. Sullivan, Commissioner

Shane Ferrari, Sheriff
Tanya Shelby, Clerk
Carol Taulbee, Treasurer
Jimmy Voita, Assessor

SAN JUAN COUNTY
100 South Oliver Drive
Aztec, NM 87410-2432

January, 2022

ATTN: SAN JUAN COUNTY VENDORS

Subject: Campaign Contribution Disclosure Law

To whom it may concern:

Effective May 17, 2006, state legislation requires that any prospective contractor seeking to enter in to a contract with San Juan County, must file a Campaign Contribution Disclosure Form (copy enclosed) with the County. Campaign Contribution Disclosure Forms will be required for **each** Request for Proposal submitted, sole source award, or small purchase professional service contract with San Juan County.

The Campaign Contribution Disclosure Form must be filed by any prospective contractor whether or not they, their family member, or their representative has made any contributions exceeding two hundred and fifty dollars (\$250), to an applicable state or local public official **prior** to execution of a contract. Campaign contributions made during the two (2) years prior to the date on which the contractor submits a proposal, or in the case of a sole source or small purchase contract, the two years prior to the date the contractor signs the contract, requires the filing of a Campaign Contributions Disclosure Form if the campaign contribution amount exceeded \$250.

A prospective contractor, family member, or representative of the prospective contractor shall not give a campaign contribution or other thing of value to an applicable public official or the applicable public official's employees during the pendency of the procurement process or during the pendency of negotiations for a sole source or small purchase contract. Applicable local public officials for San Juan County are listed above.

Failure to timely complete and return the Campaign Contribution Disclosure Form may delay or prevent business transactions with San Juan County. Should you or a family member, as defined in the Campaign Contribution Disclosure Form, make a future campaign contribution exceeding the \$250 threshold, a Campaign Contribution Disclosure Form must be completed and returned to San Juan County's Central Purchasing Office located at 213 South Oliver Drive, Aztec, New Mexico 87410.

Please contact the Office of Central Purchasing at (505) 334-4551, Monday-Thursday, 7:00 a.m. to 5:30 p.m., should you have any questions or concerns.

Sincerely,

Diana Chapman
Chief Procurement Officer

Enclosure

CAMPAIGN CONTRIBUTION DISCLOSURE FORM

Pursuant to NMSA 1978, § 13-1-191.1 (2006), any person seeking to enter into a contract with any state agency or local public body **for professional services, a design and build project delivery system, or the design and installation of measures the primary purpose of which is to conserve natural resources** must file this form with that state agency or local public body. This form must be filed even if the contract qualifies as a small purchase or a sole source contract. The prospective contractor must disclose whether they, a family member or a representative of the prospective contractor has made a campaign contribution to an applicable public official of the state or a local public body during the two years prior to the date on which the contractor submits a proposal or, in the case of a sole source or small purchase contract, the two years prior to the date the contractor signs the contract, if the aggregate total of contributions given by the prospective contractor, a family member or a representative of the prospective contractor to the public official exceeds two hundred and fifty dollars (\$250) over the two year period.

Furthermore, the state agency or local public body shall void an executed contract or cancel a solicitation or proposed award for a proposed contract if: 1) a prospective contractor, a family member of the prospective contractor, or a representative of the prospective contractor gives a campaign contribution or other thing of value to an applicable public official or the applicable public official's employees during the pendency of the procurement process or 2) a prospective contractor fails to submit a fully completed disclosure statement pursuant to the law.

THIS FORM MUST BE FILED BY ANY PROSPECTIVE CONTRACTOR WHETHER OR NOT THEY, THEIR FAMILY MEMBER, OR THEIR REPRESENTATIVE HAS MADE ANY CONTRIBUTIONS SUBJECT TO DISCLOSURE.

The following definitions apply:

"Applicable public official" means a person elected to an office or a person appointed to complete a term of an elected office, who has the authority to award or influence the award of the contract for which the prospective contractor is submitting a competitive sealed proposal or who has the authority to negotiate a sole source or small purchase contract that may be awarded without submission of a sealed competitive proposal.

"Campaign Contribution" means a gift, subscription, loan, advance or deposit of money or other thing of value, including the estimated value of an in-kind contribution, that is made to or received by an applicable public official or any person authorized to raise, collect or expend contributions on that official's behalf for the purpose of electing the official to either statewide or local office. "Campaign Contribution" includes the payment of a debt incurred in an election campaign, but does not include the value of services provided without compensation or unreimbursed travel or other personal expenses of individuals who volunteer a portion or all of their time on behalf of a candidate or political committee, nor does it include the administrative or solicitation expenses of a political committee that are paid by an organization that sponsors the committee.

"Family member" means spouse, father, mother, child, father-in-law, mother-in-law, daughter-in-law or son-in-law.

"Pendency of the procurement process" means the time period commencing with the public notice of the request for proposals and ending with the award of the contract or the cancellation of the request for proposals.

"Person" means any corporation, partnership, individual, joint venture, association or any other private legal entity.

"Prospective contractor" means a person who is subject to the competitive sealed proposal process set forth in the Procurement Code or is not required to submit a competitive sealed proposal because that person qualifies for a sole source or a small purchase contract.

"Representative of a prospective contractor" means an officer or director of a corporation, a member or manager of a limited liability corporation, a partner of a partnership or a trustee of a trust of the prospective contractor.

DISCLOSURE OF CONTRIBUTIONS:

Contribution Made By: _____

Relation to Prospective Contractor: _____

Name of Applicable Public Official: _____

Date Contribution(s) Made: _____

Amount(s) of Contribution(s) _____

Nature of Contribution(s) _____

Purpose of Contribution(s) _____

(Attach extra pages if necessary)

Signature

Date

Title (position)

Business Name

--OR--

NO CONTRIBUTIONS IN THE AGGREGATE TOTAL OVER TWO HUNDRED FIFTY DOLLARS (\$250) WERE MADE TO AN APPLICABLE PUBLIC OFFICIAL BY ME, A FAMILY MEMBER OR REPRESENTATIVE.

Signature

Date

Title (Position)

Business Name