



## Legislation Text

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**File #:** 22-2432, **Version:** 1

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**STRATEGIC PRIORITY:** Government Performance & Financial Management  
**AGENDA DATE:** November 9, 2022  
**COUNCIL DISTRICT(S):** All  
**DEPARTMENT:** Office of Procurement Services  
**EXECUTIVE:** Jack Ireland

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### **SUBJECT**

Authorize a three-year service contract, with one two-year renewal option, for retiree concierge services for the Department of Human Resources - Health Advocate Solutions, Inc., most advantageous proposer of four - Not to exceed \$631,688.40 - Financing: Employee Benefits Fund (subject to annual appropriations)

### **BACKGROUND**

This action does not encumber funds; the purpose of a service contract is to establish firm pricing for services, for a specific term, which are ordered on an as needed basis.

This service contract will provide retiree concierge services for the Department of Human Resources. The City is dedicated to assisting pre-65 retirees, prospective retirees as they age-in to 65, and post-65 retirees to better navigate their health benefit and wellness options. The City has attempted to manage these services with existing staff and resources in the past and is seeking to improve outreach and efficiencies by engagement of experts, which is best practices for an organization of our stature. The City will partner with the recommended vendor to assist employees about to retire, pre-65 retirees, age-in retirees, post retirees and comeback retirees during their transition phases.

The supplier will be responsible for training and assisting staff to respond to questions on retiree benefit options, assist them in evaluating the best plans for them. In addition, they will serve as a retiree advocate if they encounter barriers or challenges and provide retirees with access to self-service tools.

A six-member committee from the following departments reviewed and evaluated the qualifications:

- City Controller's Office (1)
- Department of Human Resources (2)
- Small Business Center (1)
- Water Utilities Department (1)
- Office of Procurement Services (1)\*

\*The Office of Procurement Services only evaluated the cost and local preference if applicable.

The committee selected the successful respondent on the basis of demonstrated competence and qualifications under the following criteria:

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|------------------------------------|-----------|
| • Cost                             | 30 points |
| • Experience                       | 25 points |
| • Overall approach and methodology | 25 points |
| • Business Inclusion and Diversity | 15 points |
| • Local Preference                 | 5 points  |

As part of the solicitation process and in an effort to increase competition, the Office of Procurement Services used its procurement system to send out email notifications to vendors registered under relevant commodity codes. To further increase competition, the Office of Procurement Services uses historical solicitation information, the Internet, and vendor contact information obtained from user departments to contact additional vendors.

On November 10, 2015, the City Council authorized a living wage policy that requires contractors to pay their employees a “living wage” rate as established annually by the Massachusetts Institute of Technology Living Wage Calculator for Dallas County by Resolution No. 15-2141. The current calculated living wage during the solicitation process of this contract is \$15.21; the selected vendor meets this requirement.

#### **PRIOR ACTION/REVIEW (COUNCIL, BOARDS, COMMISSIONS)**

This item has no prior action.

#### **FISCAL INFORMATION**

Fund	FY 2023	FY 2024	Future Years
Employee Benefits Fund	\$210,562.80	\$210,562.80	\$210,562.80

#### **M/WBE INFORMATION**

In accordance with the City’s Business Inclusion and Development Policy adopted on September 23, 2020, by Resolution No. 20-1430, as amended, the M/WBE participation on this contract is as follows:

Contract Amount	Procurement Category	M/WBE Goal
\$631,688.40	Other Services	N/A
M/WBE Subcontracting %	M/WBE Overall %	M/WBE Overall Participation \$
N/A	N/A	N/A
• The Business Inclusion and Development Policy does not apply to Other Service contracts.		
• Health Advocate Solutions, Inc - Non-local; Workforce - 0.25% Local		

## **PROCUREMENT INFORMATION**

Method of Evaluation for Award Type:

Request for Competitive Sealed Proposal	<ul style="list-style-type: none"><li>• Utilized for high technology procurements, insurance procurements, and other goods and services</li><li>• Recommended offeror whose proposal is most advantageous to the City, considering the relative importance of price, and other evaluation factors stated in the specifications</li><li>• Always involves a team evaluation</li><li>• Allows for negotiation on contract terms, including price</li></ul>
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The Office of Procurement Services received the following proposals from solicitation number BKZ22-00019322. We opened them on July 15, 2022. This service contract is being awarded by group to the most advantageous proposer.

\*Denotes successful proposer

<b><u>Proposers</u></b>	<b><u>Address</u></b>	<b><u>Score</u></b>
*Health Advocate Solutions, Inc.	3043 Walton Rd. Plymouth Meeting, PA 19462	Group 1-77.25 Group 2-77.25
Retiree First, LLC	1000 Midlantic Dr. Mount Laurel, NJ 08054	Group 1-61.88 Group 2-62.63
Extend Health, LLC	10975 S. Sterling View Dr. Suite A1 South Jordan, UT 84095	Group 1-60.75 Group 2-62.00
OG Benefits	722 Pin Oak Rd. Suite 204 Katy, TX 77494	Group 1-37.98 Group 2-37.98

## **OWNER**

**Health Advocate Solutions, Inc.**

H. Matthew Yost, Chief Executive Officer