

# Audit and Accountability Committee



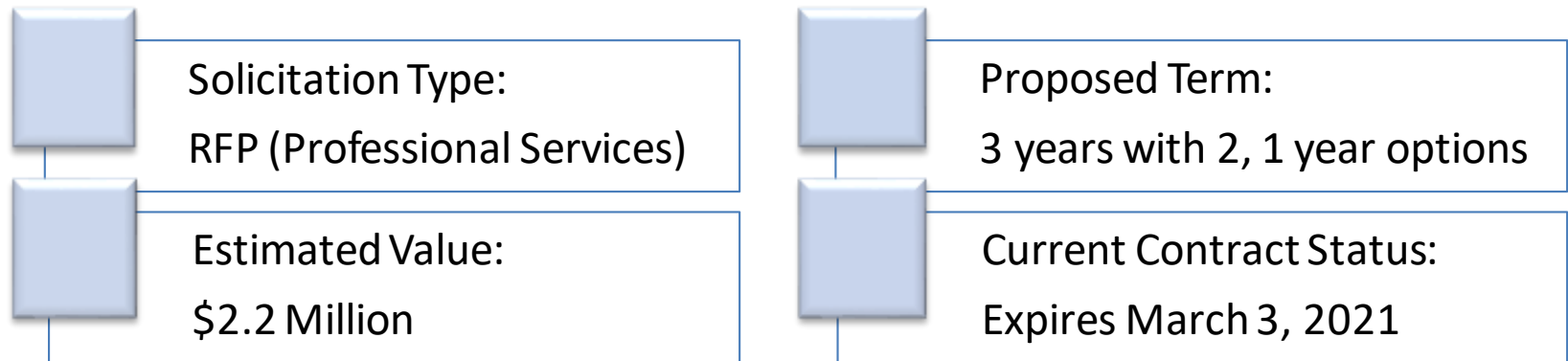
## Pre Solicitation Briefing for Employee Benefits Consultant

Date: August 18, 2020

Presented by: Lori Steward, Director, Human Resources

# Project & Solicitation Overview

The City of San Antonio is seeking proposals from a nationally experienced consulting firm with a proven track record for comprehensive benefits consulting services including but not limited to plan design review and recommendations, actuarial plan valuation, plan cost analysis, and assistance preparing and evaluating proposals for plans covered under the City of San Antonio Flexible Benefits Program.



# Solicitation Overview

Outreach	
NIGP Codes Identified	91840 – Employee Benefits Consultant
Number of Vendors to be Notified	Central Vendor Registry: 13 Veteran Owned Small Business (SBA/SCTRCA): 0 Targeted Vendor Outreach: 13
Advertising	TVSA Channel 21 COSA Bidding Opportunities website Express News

Evaluation Voting Members
Ben Gorzell, Jr., CPA, Chief Financial Officer, CMO
Lori Steward, Director, HR
Troy Elliott, Deputy CFO, Finance
Scott Huizenga, Director, OMB
Wanda Heard, Assistant Director, HR
Jim Thomas, Employee Benefits Administrator, HR

# Solicitation Requirements

---

## **Evaluation Criteria**

Experience, Background, Qualifications: 25 points  
Proposed Plan: 35 points  
Pricing: 15 points  
SBEDA Program: 10 points (MWBE 5 points; SBE 5 points)  
Local Preference Program: 10 points  
Veteran Owned Small Business Preference Program: 5 points

---

## **Additional Requirements**

SBEDA Subcontracting Requirements: None  
Audited Financial Statements: Required

---

## **Goal Setting Committee Members**

Nikki Ramos, Goal Setting Chair, Assistant Director, Parks & Recreation  
Shuchi Nagpal, Interim Assistant Director, Economic Development  
Lori Steward, Director, Human Resources  
Norbert Dziuk, Assistant Director, Finance

# Project Timeline

