



City of San Antonio

Agenda Memorandum

File Number:20-7471

Agenda Item Number: 11.

Agenda Date: 1/19/2021

In Control: Audit and Accountability Committee

**CITY OF SAN ANTONIO
HUMAN RESOURCES DEPARTMENT
Interdepartmental Correspondence**

TO: Erik Walsh, City Manager

FROM: Lori Steward, Director, Human Resources

COPIES: Audit and Accountability Committee; Ben Gorzell, Jr., CPA, Chief Financial Officer; Kevin Barthold, City Auditor; Troy Elliott, CPA, Deputy Chief Financial Officer

SUBJECT: Post-Solicitation Briefing for Employee Benefits Consultant Services

DATE: January 19, 2021

The Human Resources Department solicited proposals from experienced consulting firms to provide employee benefits consultant services for the City of San Antonio to include actuarial valuation analysis, cost analysis and validation studies for plan design changes, and the development of strategies to effectively control costs while maximizing benefits to all employees, retirees, and their dependents. The consultant will provide guidance on services such as strategic planning for healthcare and wellness services, actuarial services, vendor management, reporting, and compliance for all employee benefit plans. These services are an integral part of the annual budget process and legal compliance for the delivery of employee benefits plans.

On August 26, 2020, a Request for Proposal (RFP) was released seeking proposals from consulting firms to provide employee benefits consulting services. The estimated contract value is \$2.6 million for an initial contract term of 3 years with 2, 1-year options to renew.

On October 12, 2020, six proposals were received and deemed eligible for evaluation. The evaluation committee representatives were Ben Gorzell, Jr., CPA, Chief Financial Officer, City Manager's Office; Lori Steward, Director, Human Resources Department; Troy Elliott, Deputy Chief Financial Officer, Finance Department; Scott Huizenga, Director, Office of Management and Budget; Wanda Heard, Assistant Director, Human Resources Department; and Jim Thomas, Employee Benefits Administrator, Human Resources Department.

The evaluation committee met to discuss and score all proposals on December 4, 2020. The committee

shortlisted the top two respondents for interviews. The committee reconvened on December 14, 2020 for interviews, which were followed by final discussion and scoring. The committee recommends awarding the contract to the highest-ranked respondent.

This item is scheduled for Council consideration on February 4, 2021.