

City of Opa-locka

*Commission Chambers
215 Perviz Avenue
Opa-locka, FL 33054*



REGULAR COMMISSION MEETING Agenda

**Wednesday, May 11, 2022
7:00 PM**

City Commission

**Mayor Veronica J. Williams
Vice Mayor John H. Taylor Jr.
Commissioner Sherelean Bass
Commissioner Chris Davis
Commissioner Audrey Dominguez**

Appointed Officials

**Interim City Manager Darvin Williams
City Attorney Burnadette Norris-Weeks
City Clerk Joanna Flores, CMC**

SPEAKING BEFORE THE CITY COMMISSION

NOTE: All persons speaking shall come forward and give your full name and address, and the name and address of the organization you are representing.

There is a three (3) minute time limit for speaker/citizens forum and participation at all city commission meetings and public hearings. Your cooperation is appreciated in observing the three (3) minute time limit policy. If your matter requires more than three (3) minutes, please arrange a meeting or an appointment with the City Clerk prior to the commission meeting. City of Opa-locka Code of Ordinances Section 2-57

DECORUM POLICY

Any person making impertinent or slanderous remarks or who become boisterous while addressing the commission, shall be declared to be out of order by the presiding officer, and shall be barred from further audience before the Commission by the presiding officer, unless permission to continue or again address the commission be granted by the majority vote of the commission members. City of Opa-locka Code of Ordinances Section 2-58

NOTICE TO ALL LOBBYISTS

Any person appearing in a paid or remunerated representative capacity before the city staff, boards, committees and the City Commission is required to register with the City Clerk before engaging in lobbying activities. *City of Opa-locka Code of Ordinances Section 2-18*

FLORIDA STATUTES, CHAPTER 285.0105

"If a person decides to appeal any decision made by the Board, Agency or Commission with respect to the proceedings, and that, for such purpose, that person may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based."

PROCEDURES FOR PUBLIC PARTICIPATION**How to watch the meeting**

Members of the public can watch public meetings and public hearings at <https://www.youtube.com/user/CityofOpaLocka>

City Commission Meetings are held in-person while allowing virtual participation. Members of the public wishing to address the Commission may do so in person or virtually.

To participate virtually, please register by 7:00 p.m. on the scheduled meeting date via the City of Opa-locka website at www.opalockafl.gov.

CITY OF OPA-LOCKA
“The Great City”

AGENDA
REGULAR COMMISSION MEETING
May 11, 2022
7:00 P.M.

1. CALL TO ORDER:

2. ROLL CALL:

3. INVOCATION:

4. PLEDGE OF ALLEGIANCE:

5. AWARDS/PROCLAMATIONS/ACKNOWLEDGMENTS:

World Lupus Day

6. APPROVAL OF CONSENT AGENDA AND PULL LIST (deferrals and deletions):

7. APPROVAL OF AGENDA:

8. APPROVAL OF MINUTES:

Regular Commission Meeting Minutes – April 13, 2022

9. DISTRICT ONE / DISTRICT TWO - COUNTY COMMISSIONER REPORT:

10. PUBLIC PRESENTATIONS:

1. Senator Shevrin D. Jones
Florida Senate, District 35
Ref: Legislative Update

11. CITIZENS' FORUM:
(Opportunity for discussion of any concerns – please limit to 3 minutes)

12. ACTION ITEMS (items from consent agenda pull list):

13. ADMINISTRATION:

CONSENT AGENDA:

1. A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA, AUTHORIZING THE CITY MANAGER TO ISSUE A REQUEST FOR

PROPOSALS (RFP) FOR DRAINAGE CLEANING AND CCTV INSPECTION OF CITY MUNICIPAL STORM SEWER SYSTEM; PROVIDING FOR INCORPORATION OF RECITALS; PROVIDING FOR AN EFFECTIVE DATE. *Sponsored by City Manager*

2. A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA, ACCEPTING THE PROPOSAL OF SAPOZNIK INSURANCE & ASSOCIATES, LLC FOR AGENT OF RECORD INSURANCE SERVICES FOR THE CITY'S EMPLOYEE BENEFIT PROGRAMS PURSUANT TO RFQ NO. 21-0629100; AUTHORIZING THE CITY MANAGER TO ENTER INTO AN AGREEMENT ATTACHED HERETO AS EXHIBIT "A"; PROVIDING FOR ADOPTION OF REPRESENTATIONS; PROVIDING FOR AN EFFECTIVE DATE. *Sponsored by City Manager*

3. A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA, RECOGNIZING MAY 15-21, 2022 AS "NATIONAL PUBLIC WORKS AND PUBLIC SERVICE WEEK"; PROVIDING FOR INCORPORATION OF RECITALS; PROVIDING FOR AN EFFECTIVE DATE. *Sponsored by City Manager*

14. NEW ITEMS:

15. PLANNING & ZONING:

A. PUBLIC HEARINGS:

B. APPEALS:

16. ORDINANCES/RESOLUTIONS/PUBLIC HEARINGS:

A. FIRST READING ORDINANCE(S)/PUBLIC HEARING(S):

B. SECOND READING ORDINANCE(S)/PUBLIC HEARING(S):

C. RESOLUTION(S):

17. CITY MANAGER'S REPORT:

18. OFFICIAL BOARD REPORTS:

19. FUTURE AGENDA ITEMS:

20. MAYOR/COMMISSION REPORTS:

21. OFFICIAL BOARD APPOINTMENTS:

**Historic Environmental Preservation Board
1 at-large appointment**

Housing Authority and Nuisance Abatement Board

1 individual appointment (Vice Mayor Taylor)

1 individual appointment (Mayor Williams)

Community Relations, Recreation and Activities Board

1 individual appointment (Vice Mayor Taylor)

1 individual appointment (Commissioner Davis)

1 individual appointment (Commissioner Dominguez)

Planning & Zoning Board

2 at-large appointments

22. ADJOURNMENT:

SCHEDULE OF FUTURE WORKSHOPS/OFFICIAL ACTIVITIES

- A. Feedback Fridays with City of Opa-locka Commissioner Sherelean Bass, **every Friday** from 4:00 p.m. – 5:00 p.m., Opa-locka Municipal Complex, 780 Fisherman Street, 4th Floor, Opa-locka, Florida.**
- B. City of Opa-locka Planning & Zoning Board Meeting, **Tuesday, May 10, 2022** at 6:00 p.m., Sherbondy Village Auditorium, 215 Perviz Avenue, Opa-locka, Florida.**
- C. City of Opa-locka Charter Review Board Citizens Input Workshop on **Wednesday, May 11, 2022** at 6:00 p.m., Sherbondy Village Auditorium, 215 Perviz Avenue, Opa-locka, Florida.**
- D. City of Opa-locka Walking One Stop Initiative, **Monday, June 13, 2022** from 9:30 a.m. – 12:00 p.m., at Glorieta Garden's Apartments, 13210 Alexandria Drive, Opa-locka, Florida. *Hosted by Commissioner Chris Davis and Wayne Rawlins***
- E. City of Opa-locka After School Program, **August 23, 2021 – June 8, 2022**, Monday – Friday from 1:00 p.m. – 6:00 p.m., Helen Miller Center, 2331 NW 143rd Street, Opa-locka, Florida. We offer homework assistance, tutoring, healthy snacks, school pick-up and recreational activities. Program price: resident \$20.00 weekly – non-resident \$25.00 weekly.**
- F. City of Opa-locka Human Resources Department presents “Who wants to work Wednesdays” Open House, **every Wednesday** from 10:00 a.m. – 11:30 a.m., Opa-locka City Hall, 780 Fisherman Street, 1st floor lounge, Opa-locka, Florida. Offering on the spot interviews.**

For further information, please contact the Office of the City Clerk by telephone at (305) 953-2800 or email jflores@opalockafl.gov.

APPROVAL OF MINUTES

CITY OF OPA-LOCKA

“The Great City”

CLERK’S ACTION SUMMARY MINUTES

REGULAR COMMISSION MEETING

April 13, 2022

7:00 P.M.

1. CALL TO ORDER:

Mayor Williams called the meeting to order at 7:04 p.m. on Wednesday, April 13, 2022 at Sherbondy Village, 215 Perviz Avenue, Opa-locka, Florida.

2. ROLL CALL:

The following members of the City Commission were present: Commissioner Sherelean Bass, Commissioner Audrey Dominguez, Vice Mayor John H. Taylor Jr., and Mayor Veronica J. Williams. Commissioner Davis arrived at 7:16 p.m. Also, in attendance were: Interim City Manager Darvin Williams, City Attorney Burnadette Norris-Weeks, Assistant City Attorney Candice Cobb and City Clerk Joanna Flores.

3. INVOCATION:

The Invocation was delivered by Commissioner Dominguez.

4. PLEDGE OF ALLEGIANCE:

The Pledge of Allegiance was recited in unison.

5. AWARDS/PROCLAMATIONS/ACKNOWLEDGMENTS:

There were none.

6. APPROVAL OF CONSENT AGENDA AND PULL LIST (deferrals and deletions):

It was moved by Vice Mayor Taylor, seconded by Commissioner Dominguez to approve the Consent Agenda.

There being no discussion, the motion to approve the Consent Agenda passed by a 4-0 vote.

Commissioner Dominguez	Yes
Vice Mayor Taylor	Yes

Commissioner Bass	Yes
Commissioner Davis	Not Present
Mayor Williams	Yes

7. APPROVAL OF AGENDA:

It was moved by Vice Mayor Taylor, seconded by Commissioner Dominguez, to approve the Agenda.

There being no discussion, the motion to approve the Agenda passed by a 4-0 vote.

Vice Mayor Taylor	Yes
Commissioner Bass	Yes
Commissioner Davis	Not Present
Commissioner Dominguez	Yes
Mayor Williams	Yes

8. APPROVAL OF MINUTES:

ARPA Workshop Meeting Minutes - February 22, 2022

It was moved by Commissioner Bass, seconded by Vice Mayor Taylor to approve the minutes from the **ARPA Workshop Meeting Minutes - February 22, 2022**.

There being no discussion, the motion to approve the minutes passed by a 4-0 vote.

Vice Mayor Taylor	Yes
Commissioner Bass	Yes
Commissioner Davis	Not Present
Commissioner Dominguez	Yes
Mayor Williams	Yes

Joint Charter Review Board Workshop Meeting Minutes - February 22, 2022

It was moved by Commissioner Bass, seconded by Vice Mayor Taylor to approve the minutes from the **Joint Charter Review Board Workshop Meeting Minutes - February 22, 2022**.

There being no discussion, the motion to approve the minutes passed by a 4-0 vote.

Commissioner Bass	Yes
Commissioner Davis	Not Present
Commissioner Dominguez	Yes

Vice Mayor Taylor	Yes
Mayor Williams	Yes

Regular Commission Meeting Minutes - March 23, 2022

It was moved by Commissioner Bass, seconded by Vice Mayor Taylor to approve the minutes from the **Regular Commission Meeting Minutes - March 23, 2022.**

There being no discussion, the motion to approve the minutes passed by a 4-0 vote.

Commissioner Davis	Not Present
Commissioner Dominguez	Yes
Vice Mayor Taylor	Yes
Commissioner Bass	Yes
Mayor Williams	Yes

9. DISTRICT ONE / DISTRICT TWO - COUNTY COMMISSIONER REPORT:

There was none.

10. PUBLIC PRESENTATIONS:

1. Allison Abel, Director of Marketing

Green Fields Fitness

RE: Ways to bring multigenerational, inclusive outdoor fitness opportunities to residents with the goal of promoting physical health and enhancing the community.

Ms. Allison Abel made a presentation to the City Commission on behalf of Green Fields Fitness.

Mayor Williams thanked Ms. Abel for her presentation, and she said that the Members of the Commission met another Green Fields Fitness representative in Kissimmee who informed them that their company had installed the exercise equipment at Magnolia Park over 10 years ago. The Mayor went on to say that the Commission is grateful that they can make this connection again because they know that health and fitness is important. She added that when she saw the video before, she thought it was absolutely something that the City needs, and she said that she especially needs it in her life.

Green Fields Fitness Director of Marketing Allison Abel said that the Commission had met their company's representative Sam Mendelson in Kissimmee.

Commissioner Bass expressed that she was incredibly pleased to see that the exercise equipment offered by Green Fields Fitness, includes equipment for those that are in a wheelchair, and she said it was really good that the disabled will be able to utilize the park like the rest of the community.

Green Fields Fitness Director of Marketing Allison Abel stated that their company emphasizes the equipment for disabled members of the community because she said that those with physical disabilities are especially at risk for obesity because of their unique challenges and the related health concerns.

Vice Mayor Taylor stated that he just loved the whole overall presentation and recalled that he said the same thing when he met the representative from Green Fields Fitness in Kissimmee. The Vice Mayor joined Commissioner Bass in stating how much he liked that the company involves everyone and added that he loves their saying, taking fitness to the people. He concluded by thanking Green Fields Fitness Director of Marketing Allison Abel for bringing her presentation to Opa-locka.

11. CITIZENS' FORUM:
(Opportunity for discussion of any concerns – please limit to 3 minutes)

City Clerk Joanna Flores announced the protocol for public participation at City Commission meetings.

Mayor Williams opened the Citizens' Forum.

Ms. Natasha Ervin who resides at 670 Dunad Avenue informed the Commission that she was upset. Ms. Ervin recalled that City Employee Sharon got fired for speaking to Commissioner Burke and lost everything she had, needed to move in with others and nobody did anything because it's said that it's day to day. She went on to say that Ray Charles can see what is going on here, and said that somebody is corrupt, asking the Florida Department of Law Enforcement, Federal Bureau of Investigation, the State Attorney's Office, the State of Florida, Florida Chief Inspector General Melinda Miguel, and Karl Ross to help because she said that somebody has to help with the situation. Ms. Ervin also said that they are all worries about people that quit or get fired, but she said that nobody was worries about the 4 regular employees that quit out of the Parks & Recreation Department because there was absolutely nothing going on and they felt bad coming every day to do absolutely nothing because at the end of the day it's stealing. She said that talking to the Commission was not going to really help, adding that the residents of Opa-locka have to step up because 3 or 4 of them can't do it and need all the residents to help them really clean up the City. Ms. Ervin went on to say that there's something nasty going on here that she does not believe it looks or smells right, recalling that her Mama told her that one rotten apple will ruin the whole bunch and urging the Commission to not let one rotten

apple ruin them, acknowledging that some of them have good hearts and stating that it is hard for her to group them all together. She informed the Commission that there is a newbie in the audience who said she had to come see for herself because she saw it on TV and her mouth dropped, to which Ms. Ervin replied that it was true. Additionally, she said that the City fires people for doing things that are ethically wrong and hires them right back, also stating that the good apples should know who the bad apples are and should have felt like they were bamboozled.

Ms. Chris Roberts who resides at 640 Dunad Avenue stated that the City was paying a public relations person \$218,000 from August to January and when the City Manager changed, they conveniently terminated their contract, and she said she wondered why. Ms. Roberts also stated that the City has an Assistant City Manager, who she said she didn't have to call by name because everybody knows who it is, and she went on to say they bamboozled some people, pled guilty, had to pay a \$500 fine, and they brought them back, adding that she had the documents to prove it. She also stated that they had someone sitting in the audience that was hired back too, who she said had two bad deals and the City lost \$1 million. Ms. Roberts expressed her opinion that nobody says anything and that everybody says to take their 3 minutes and go. Directing her statement to everybody on the Dais, she said that when complaints are filed with Miami-Dade County, it plays with people's careers. Ms. Roberts went on to say that one person on the Dais doesn't care because they can't even pass the teacher's test to become a teacher and has a contract.

Mayor Williams stated that insults are not permitted as part of the Citizens Forum decorum policy.

City Attorney Norris-Weeks reminded the Commission that they have rules of procedure that deal with the time, place and manner and that if things are out of order, the Mayor can stop it with the assistance of whatever law enforcement is available for that one meeting.

Mayor Williams asked City Clerk Flores to read once again into record the rules of the Citizens' Forum and asked City Manager Williams to have a Sergeant at Arms in the Commission Meetings.

City Manager Williams confirmed that a Sergeant at Arms will be present at the Commission Meetings.

City Clerk Flores read the decorum policy included in Section 2-58 of the City of Opa-locka Code of Ordinances.

Lamar Cruse of 13831 NW 24th Avenue stated that he had two issues he would like to address. The first issue Mr. Cruse addressed, he said that he had brought up before and recalled that someone said their particular alleyway was clean, but he lamented that the

alleyways in his particular area are still dirty and he reported that the guys run through them and just weed, leaving trash like it's no problem. He went on to say that if he did work for the City and it was a sham, he would probably clean up around the Commission area and not around the rest of the residences. The second issue Mr. Cruse addressed was Cairo Lane, recalling hearing it be addressed, but reporting that it has a big pothole despite them spending so much money to get it cleaned up and organized. He informed the Commission that his truck just fell in the pothole, but he said that instead of him trying to file a report and sue the City, he just felt it was necessary to address the issue before the Commission, adding that he has pictures to show demonstrating that there is no cone or anything covering the pothole. Mr. Cruse expressed disappointment that he called the City to address the issue, but nobody went by and there are still no cones. He said he'd like to personally address the people that he said were ripping off the City, adding that it makes no sense. Mr. Cruse said that if somebody else is in charge of making sure the potholes have a cone, he guessed that the Commission can have the City Manager get somebody out there or something. He concluded by expressing his hope that they have peace in the City of Opa-locka.

Ms. Dorothy Johnson who resides at 13724 NW 22nd Place publicly apologized to her neighbor because he said he wasn't coming back to any of the meetings but said that she thinks it was misinformation and added that she was glad to see him there. Ms. Johnson expressed her hope that the elected officials really completed the 305 survey, stating that it is good information. She also said that she thinks next time she is going to bring information to the Commission as a public presentation because she doesn't want to take her 3 minutes trying to do so. Ms. Johnson stated that \$90 million was awarded through the Miami-Dade County Peace and Prosperity Plan, to be implemented in 19 years, and she said that she has a whole list of things she would have said on it but is not going to do. She urged City Staff to do some research on that and bring back any fruitful information that would help the City. Expressing her hope that someone has passed on the information about the Integrity Group to the City Manager, she explained that the company was vetted, and the City had an opportunity to piggyback. Ms. Johnson also stated that she hoped the City doesn't lose money with the change of different City Managers. Adding that she is more disturbed, Ms. Johnson recalled that former City Manager Pate stated his concern about interfering with day-to-day operations, and she highly suggested that the Commission does not mention how they felt about things that were not explained to them, because she said it is a gray line. Noting that the Commission had a resolution for public relations, she strongly suggested that they put in the multiple ways to get information to reach the community at large and elaborate it in the request for proposals. Ms. Johnson also noted that they had a resolution for a strategy plan but said that she doesn't think they have the money and because it's the same people except for one, she asked for someone to explain a strategy plan versus their priority plan that they went over and over. Additionally, she said that she had noticed that sometimes the mic is away from them and it's not capturing

everything they are stating, and she urged the Commission to be extremely cautious with that and suggested that the Information Technology Department can help them with that. Ms. Johnson concluded by stating that she is disturbed and thinks at this point, they all need to be respectful to each other and urged the Commission to leave a great legacy with every decision they are making, thanking them and asking God to bless them.

There being no additional members of the public to address the Commission, Mayor Williams closed the Citizen's Forum.

12. ACTION ITEMS (items from consent agenda pull list):

There were none.

13. ADMINISTRATION:

CONSENT AGENDA:

- 1. A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA, ACCEPTING THE PROPOSAL OF GULFSTREAM PETROLEUM SERVICES, INC. FOR THE REMOVAL OF UNDERGROUND STORAGE TANKS PURSUANT TO RFP NO. 21-0929200 AND FURTHER AUTHORIZING THE CITY MANAGER TO ENTER INTO AN AGREEMENT FOR SAME; PROVIDING FOR ADOPTION OF REPRESENTATIONS; PROVIDING FOR AN EFFECTIVE DATE. *Sponsored by City Manager***
- 2. A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA, AUTHORIZING ISSUANCE OF A REQUEST FOR PROPOSALS ("RFP") FOR A PUBLIC RELATIONS AND MARKETING CONSULTANT; PROVIDING FOR INCORPORATION OF RECITALS; PROVIDING FOR AN EFFECTIVE DATE. *Sponsored by City Manager***
- 3. A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA, AUTHORIZING ISSUANCE OF A REQUEST FOR QUALIFICATIONS ("RFQ") FOR A FACILITATOR TO FACILITATE DEVELOPMENT OF A NEW CITY STRATEGIC PLAN; PROVIDING FOR INCORPORATION OF RECITALS; PROVIDING FOR AN EFFECTIVE DATE. *Sponsored by Commissioner Davis, Mayor Williams and Commissioner Bass***
- 4. A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA, DIRECTING THE CITY MANAGER TO ESTABLISH A FREE PAINT PROGRAM TO ASSIST ELIGIBLE CITY PROPERTY**

OWNERS WITH HOME BEAUTIFICATION EFFORTS; PROVIDING FOR INCORPORATION OF RECITALS; PROVIDING FOR AN EFFECTIVE DATE. *Sponsored by Commissioner Dominguez*

Vote taken on Consent Agenda items can be viewed under Agenda Item 6 – Approval of the Consent Agenda.

14. NEW ITEMS:

There were none.

15. PLANNING & ZONING:

A. PUBLIC HEARINGS:

- 1. A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA APPROVING THE FINAL SITE PLAN REVIEW REQUEST FOR THE CONSTRUCTION OF A FIVE-STORY, 98 UNIT RESIDENTIAL BUILDING THAT INCLUDES 10 LIVE-WORK UNITS AND 196 PARKING SPACES AT APPROXIMATELY 13800 NW 22ND AVENUE, WITHIN THE CITY; IDENTIFIED BY FOLIOS 08-2122-011-0240, 08-2122-011-0250, 08-2122-011-0260, AND 08-2122-011-0310 IN THE B-2 ZONING DISTRICT AND WITHIN THE CORRIDOR MIXED USE OVERLAY DISTRICT; PROVIDING FOR INCORPORATION OF RECITALS; PROVIDING FOR AN EFFECTIVE DATE. *Sponsored by City Manager***

The above ordinance was read by Assistant City Attorney Candice Cobb.

It was moved by Commissioner Dominguez, seconded by Commissioner Davis to discuss Agenda Item 15-A-1.

Mayor Williams opened the Public Hearing for Agenda Item 15-A-1.

Mr. Robert Holland, whose office is located at 3250 NE 1st Avenue, Suite 334 in Miami, stated that he was speaking before the Commission on behalf of the Mosaic development being proposed. Mr. Holland pointed out that the property has as a matter of right, the ability to develop one hundred units and ninety-six parking spaces. He informed the Commission that his client purchased the property and is seeking to increase the development from four stories to five, pointing out that they're allowed to go even higher but stating that they were proposing the increase to include additional parking on the

site, with a decrease from the number of units approved to ninety-eight units and 196 parking spaces. Mr. Holland said that he thinks they've listened to the Commission over the months, and recognized that there have been issues with parking, adding that instead of developing what they could already do, they are attempting to come before the Commission with something that's different. He also said that the original proposed development was a mix of 1 and 2 bedrooms, but the new proposal is a mix of 2 bedrooms with a den, 3 bedrooms with a den and 10 live-work spaces that will be regulated by the City to establish whether it will be somebody doing something minor like tax returns or a call center from the facility. Assuring the Commission that the proposal is an improvement from what they have already approved, he said that he's spoken to some of them individually over time about some of the things they want, including trying to make sure that new developments have a higher standard of appreciation for Opa-locka, with their maintenance. Mr. Holland then reviewed the development agreement proposed by the companion Agenda Item, and said that in addition to the language that City Staff already had in there dealing with job fairs, the advertising for it and job placement through Career Source, they've added a number of other things that hopefully other developers will consider to offer as well, as they come into the City on the residential side. He said that they agreed to paint the building no less than every 10 years and repair all roof leaks within 3 weeks from the time of notice in writing by the tenant or the municipality. Mr. Holland also stated that all inoperable vehicles and cars with expired tags will have to be removed from the premises and cannot be stored there, all the tenants will be registered with the property manager so that only the tenants on the lease will be allowed to live on the property, landscaping will be maintained at the standards included in the approved site plan in intervals of no more than 3 weeks, adding that if the grass or a tree dies for any reason it has to be replaced within 45 days of notice. Acknowledging that in Opa-locka and many other cities, developments go in very pretty and erode over time with nobody having any fight to go back and tell them to fix it, but he said that his client will have an obligation going forth and the development agreement is a 30-year term. Mr. Holland went on to inform the Commission that the property owner will be required to make sure that all of the units have uniform window treatment, so they won't have a mirage of treatments, and that laundry and personal effects hanging from exterior terrace balconies is strictly prohibited. He also said that all units will be repainted, repaired and cleaned prior to new tenancy and the units of tenants who have been there for 5 years will also be required to be repainted, noting

that what typically happens is that if somebody is in a unit for a while, it never gets revisited in most multi-family residential facilities. Additionally, Mr. Holland said that the landlord will have to monitor loud music and noise, which will be strictly prohibited after 10 p.m. He also said that any tenants convicted of a felony during their tenancy shall be strictly prohibited from having their tenancy extended, but he offered assurances that it doesn't mean they can't have a felony record from before, with gambling, drug sales and usage as well as any criminal activity being strictly prohibited on the grounds. Mr. Holland went on to note that Officers will tell you that knowledge can be imputed, and he said that if it is something that happens regularly and a landlord knows, it would be a violation to the landlord as well. He stated that the property owners will maintain an exterior camera system 24-hours, 7 days a week with the footage stored on a cloud drive for at least 60 days, so that the Police Department has access to that whenever something happens on the exterior of the grounds. Mr. Holland also said that the property will establish a contract to provide trash collection services and the appropriate size containers, making sure those areas are sanitized, pointing out that sometimes to save a few dollars smaller trash receptacles are not dumped on a regular basis and there is trash all over the place, but they are trying to make sure the development doesn't have that issue. He added that the property will make sure that the grounds and building are free of debris, graffiti and loitering at all times. Reminding the Commission that even if his client sells the property, whoever comes in has the same obligation to maintain it, adding that if they start doing this one building at a time, the look of the City will start to improve and will make it something everybody feels comfortable coming home to. Pointing out that there is a housing shortage and that everybody cannot afford single-family homes right now, to the point that African-Americans are being priced out of the market, he said that they have to look at different housing types to be able to make sure that they have people who can stay in the Community in a very comfortable way. Mr. Holland concluded by stating that he's always promised the Commission that when he comes to them, he tries to make sure to bring something that they can be proud of, and also allows them to hold people's feet to the fire long term and offered to make himself available for questions.

Interim City Manager Williams stated that he would like to have Planning and Community Development Director Gregory Gay provide the Commission with an explanation of the project proposed by Agenda Item 15-A-1.

Planning and Community Development Director Gregory Gay informed the Commission that the 2 Agenda Items they are considering are companion Items, with the first Item dealing with the site plan. Acknowledging that it had already been explained, Mr. Gay said it will be a 5-story development with ninety-eight units, including a mixture of two bedroom and 3-bedroom units, along with ten live-work units. He explained that the ten live-work units came about because it is a mixed-use zoning area, allowing for commercial and residential development. Mr. Gay also reiterated that the development is going to have 196 parking spaces, pointing out that it well exceeds the parking requirements for this particular type of development. He said that Mr. Holland pretty much covered a lot of the specifics. Addressing the proposed development agreement, Mr. Gay informed the Commission that they did proffer a number of things related to the maintenance and upkeep of the property, in addition to what is normally requested as it relates to making the project accessible for the people that reside within Opa-locka. Additionally, he said that if there are any job opportunities, they proffered that they will be created from the construction phase through the management and upkeep of the property. Mr. Gay reported that the proposed development was presented before the Planning & Zoning Board, which recommended approval of the site plan and development agreement. He concluded by offering to address any questions.

Ms. Dorothy Johnson who resides at 13724 NW 22nd Place stated that as a new member of the Planning & Zoning Board, she wanted to make a couple of suggestions which she said that she could share with Mr. Robert Holland, who she said she knew very well, having collaborated with him as the Chair of the Historic Hampton House. Ms. Johnson expressed her hope that documented annual inspections are part of what is being talked about. She also recommended that the Commission make sure that the 5-story proposed development is in compliance with the Federal Aviation Administration because Opa-locka is in an air restricted area. Noting the things that the City is going through now, she suggested that the Commission make sure the proposed development has security. Reminding everyone that she had been on the Commission, Ms. Johnson said that she also noticed pest control, asking how often and when it would be done. She also said that she thinks it is very crucial to have a whistle act policy in all housing because she believes people will say things but don't want to be a part of it because for some people, see something say something is just not going to happen. Ms. Johnson concluded by urging the Commission and Mr. Holland to incorporate or think about the things she suggested.

Mr. Robert Holland assured the Commission that he doesn't think they would have a problem with any sort of whistle blower policy that the Commission comes up with for residential programs, adding that he thinks it helps everybody. Mr. Holland suggested committing to contracting pest control services every 3 months, but he said that tenants need to understand that when they don't respond to the notice, they do open their place up to go in and do the pest control because they don't just do one unit and come back but rather go unit by unit, acknowledging that some people get offended by that. He also stated that he failed to mention that the units will be pre-marketed for the first 6 months in Opa-locka before they go anywhere else, offering to post it on the City's website if they have accommodations for that, in an effort to try to make sure the people of Opa-locka have the chance to upgrade their housing situation if they want to.

Lamar Cruse of 13831 NW 24th Avenue informed the Commission that he deals with a lot of guys who run apartment buildings and businesses, including Andrew Fritz who he said owns 180 properties. Mr. Cruse shared that he wanted everybody to know that he is an ex-felon and has been out of prison for 20 years, taking care of many kids in the Community, owning three properties and doing good. Asking God to be with him and asserting that he believes in the right God compared to the rest of them, he said that he makes sure the kids in the community know that he takes care of them and takes them to Disney World, having just come back from taking fifteen kids and spending his money. Mr. Cruse went on to say that Andrew Fritz said that Miami isn't going to have too many of us in a little bit because they keep saying they can't be in certain communities and housing developments, adding that they are being pushed out of North Carolina. He stated that 75% of us have somebody in our family that's an ex-felon who can't stay in a lot of these developments and he expressed concern that eventually a new crew will come in, some coming straight out of jail from across the country, and don't care about people's feelings on ex-felons. Mr. Cruse also shared that he knew a man that was on the Miami-Dade County Police Force for over 30 years, who told him that he came out of Cuba and was a felon, but they didn't know because he came with a clean slate. Adding that everybody has to change the book they say they believe in, he pointed out that it said you're supposed to forgive. Lamenting that everybody says that ex-felons have to go despite them saying that they believe, he concluded by stating that he doesn't know what book they believe in.

There being no additional members of the public to address the Commission, Mayor Williams closed the Public Hearing for Agenda Item 15-A-1.

Commissioner Bass stated that she was going to ask about the security for the proposed development, expressing her concern that she did not hear about it.

Mr. Robert Holland informed the Commission that the proposed development will be a restricted community for getting in and out, but there won't be any roaming security because there is not enough economy of scale to justify that. Mr. Holland also pointed out that because there will be a camera system in place, there will be a real-time feed of anything that's going on, on the property.

Commissioner Bass recalled that the Commission had voted on a provision for apartment and housing complexes with a certain number of residents to have security officers 24 hours a day.

Mr. Robert Holland stated that if the City's policy is to have security officers 24 hours a day, they would meet whatever is required. He also said that they will have the ability to have roving security from other properties coming in but suggested that it probably wouldn't be dedicated strictly to the proposed development unless it is required by policy.

Mayor Williams asked Planning and Community Development Director Gregory Gay to address Commissioner Bass' statement about the legislation the Commission passed requiring security officers 24 hours a day based on the number of residents in an apartment or housing complex.

Planning and Community Development Director Gregory Gay recalled that there was some legislation that included a recommendation to have a certain amount of security in place based on the number of units an apartment or housing complex has. Mr. Gay said that he didn't have the legislation in front of him at the moment but committed to pulling the specific numbers and working with the developers to let them know the information.

Commissioner Davis informed the Commission that he sponsored the legislation with former Mayor and Vice Mayor Joseph Kelley with the intent to increase security and public safety within larger multi-family complexes based on a threshold. The Commissioner asked Mr. Holland how

many units in the proposed development would be affordable and how many would be market rate.

Mr. Robert Holland informed the Commission that the proposed development will all be workforce housing.

Commissioner Davis asked what the peak and the bottom would be.

Mr. Robert Holland stated that the proposed development would reflect whatever Miami-Dade County has for workforce housing.

Commissioner Davis stated his understanding that the proposed development will be mirroring Miami-Dade County's scale for workforce housing.

Mr. Robert Holland confirmed that Commissioner Davis was correct and pointed out that they didn't come before the Commission for any variances, and re-asserted that they will meet whatever requirements are needed.

Commissioner Davis said that he thinks the proposed development would be one of the first workforce housing projects within the Community over the 4 years of his service on the Commission, adding that the City has lots of market rate, affordable and hybrid models. The Commissioner asked if they think it would be a good fit, considering that Opa-locka is the Community with the highest poverty rate of all the municipalities in Miami-Dade County and that the earnings within the Community are typically lower than neighboring communities.

Mr. Robert Holland explained that they think the market is there to accommodate folks in more vertical construction through the economy of scale, spreading the cost out to make it work. Mr. Holland also said that everybody knows there is a housing shortage with many folks who sold their places in the north and have moved here, trying to find places to go and the single-family real estate market is shooting out of the roof. He also reminded the Commission that he has always suggested they do it with the covenants and restrictions, to give themselves some protection that they will maintain long term.

Commissioner Davis noted that Planning and Community Development Director Gregory Gay mentioned the items for the upkeep of the maintenance for the proposed development, as well as the job opportunities in the construction and management phase. The Commissioner asked Mr.

Robert Holland to give the Commission a little more detail on that because he said that he didn't think he heard that in his presentation.

Mr. Robert Holland pointed out that the proposed development will meet all of the requirements of the City's development agreement, including what Commissioner Davis mentioned. He said that his clients have typically hired their management from out of the area, adding that all of the job fairs will be done in Opa-locka and will try to get people from the City to work even on the construction side. Mr. Holland also said that it is much easier to get someone to work close to a site than them having to come across town, sharing that he had a similar issue with his son working an ice cream parlor on Miami Beach for minimum wage and stating that he congratulated his son on the job but pointed out to him that every day he goes there and pays for parking or a ride sharing service, he is spending all of his money on transportation. He went on to say that it is important to have jobs in the Community that people can walk, bike or catch a quick ride to. Mr. Holland concluded by informing the Commission that he has said to the City Manager that he thinks it is important for people to go to the City's website to see the jobs that are coming to the Community, including where to apply and information about how the Commission is helping to create the opportunities.

Commissioner Davis stated that he agreed that the City could do a better job marketing the information for residents, so that they can take full advantage of opportunities.

Mayor Williams asked if Mr. Robert Holland had an idea what the pre-market rate would be for the proposed development.

Mr. Robert Holland stated that he doesn't know what the pricing would be for the proposed development, but he said that the process will be similar to what he did with Prologis, where he instructed his client to hire an African-American or Hispanic firm out of the area that kind of knows barber shops, beauty salons and other businesses that can get the information out in the Community in a very targeted way rather than in some newspaper or realtor magazine, so people know where the jobs are and where the apartment are and have the first option. Mr. Holland also recommended that it be put on the City's website and made available to first responders or City Staff.

Mayor Williams said that she asked about the pre-market rate for the proposed development because she recalled that a similar development by Sailboat Cove, marketed a few units at market rate which she said was over

\$2,000 a month with the remainder of the units being workforce housing. The Mayor said she was personally appalled because her constant goal is for Teachers, Police Officers and those that serve the Community, to be able to afford housing. She went on to say that she was almost sure that unless someone made really good money, no one moved into that particular development and she asserted that she wanted to make sure that the rate, which is marketed, can be afforded.

Mr. Robert Holland stated that he would be very honest on how rates are established, explaining that building costs have gone up about 30% and are added to the land costs, divided by the number of units and factoring in the monthly mortgage payments. Mr. Holland said that Congresswoman Fredericka Wilson is talking about getting additional subsidies to cities and counties. He also informed the Commission that many people have run from affordable housing, but said that affordable housing is not bad, especially if it is done with covenants and restrictions, pointing out that the government adding money to the pot to cap rents, is what makes it affordable housing. Mr. Holland went on to say that when developers can't get that subsidy money and there's an application process that the big guys he represents know well, they have to rent it out at the rate to get the return on the investment they owe. Pointing out that workforce housing in Miami Gardens is north of \$2,000 a month in rent and a 1-bedroom studio in Brickell is going for over \$2,500 a month in rent because the cost is through the roof. Mr. Holland reiterated that workforce housing has to be within the range established by the County, noting that it has grown over the years because of inflation, but he assured the Commission that they are trying to come to the market to accommodate what's here and get people in, adding that he can't tell them it's going to be as affordable as affordable housing because they're not getting the subsidy.

Mayor Williams recalled that Mr. Robert Holland had given her that answer before.

Mr. Robert Holland committed that he would come to the Commission with proposed affordable housing.

Mayor Williams stated that she would appreciate Mr. Robert Holland coming to the Commission with proposed affordable housing.

Vice Mayor Taylor echoed Commissioner Davis' statement that the proposed development is the first of its kind to bring the live-work concept to Opa-locka. The Vice Mayor shared that he was able to tour another one

in a different municipality and he said he thought it was a really good idea to be able to live and work where you lay your head. He also expressed appreciation for the covenant agreement and said that he hopes they stick to it.

Mr. Robert Holland assured the Commission that he doesn't ask people to put anything in writing unless he wanted to stick to it. Mr. Holland also suggested that the Commission start looking at how they hold people accountable as they have developments coming into the City.

Vice Mayor Taylor stated that he hoped it could be adopted as the City's covenant agreement going forward, to use the proposed agreement as a model.

Interim City Manager Williams informed the Commission that his Staff had reviewed the ordinance pertaining to the security of apartment and housing complexes, and that the threshold established was for 150 units. The Interim Manager noted that the proposed development is only for ninety-six units and thus the ordinance would not require them to have roving security.

Mr. Robert Holland committed to the Commission that despite the ordinance not requiring it, he would collaborate with the developer to make sure they have roving security coming through between Sailboat Cove and the proposed property. He committed to getting some information on that back to Interim City Manager Williams.

There being no additional discussion, the resolution passed by a 5-0 vote.

Commissioner Dominguez	Yes
Vice Mayor Taylor	Yes
Commissioner Bass	Yes
Commissioner Davis	Yes
Mayor Williams	Yes

2. **A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA APPROVING A DEVELOPMENT AGREEMENT FOR THE CONSTRUCTION OF A FIVE-STORY, 98 UNIT RESIDENTIAL BUILDING THAT INCLUDES 10 LIVE-WORK UNITS AND 196 PARKING SPACES AT APPROXIMATELY 13800 NW 22ND AVENUE; IDENTIFIED BY FOLIOS 08-2122-011- 0240, 08-2122-011-0250, 08-2122-011-0260, AND 08-2122-011-0310 IN THE B-2 ZONING DISTRICT AND**

**WITHIN THE CORRIDOR MIXED USE OVERLAY DISTRICT;
PROVIDING FOR INCORPORATION OF RECITALS;
PROVIDING FOR AN EFFECTIVE DATE. *Sponsored by City
Manager***

The above ordinance was read by Assistant City Attorney Candice Cobb.

It was moved by Vice Mayor Taylor, seconded by Commissioner Dominguez to discuss Agenda Item 15-A-2.

Mayor Williams opened the Public Hearing for Agenda Item 15-A-2.

There being no members of the public to address the Commission, Mayor Williams closed the Public Hearing for Agenda Item 15-A-2.

Interim City Manager Williams asked Planning and Community Development Director Gregory Gay to introduce Agenda Item 15-A-2.

Planning and Community Development Director Gregory Gay informed the Commission that the development agreement includes a number of bullet points that were added, related to items that were proffered by the development team through their attorney, including the long-term management and maintenance of the property. Mr. Gay offered assurances that the concerns about security will be addressed in the development agreement. He also reported that the proposed development agreement was recommended for approval by the Planning & Zoning Board and the Staff from his Department. Mr. Gay concluded by offering to address any questions or concerns.

Mr. Robert Holland informed the Commission that the Planning & Zoning Board made a request to add more shade trees, which he said they've agreed to do, stating that he wanted to put it on the record, so the Board recognizes that they did listen and respond to them.

Commissioner Davis asked what sort of changes took place between the time the development was first submitted for approval and now, stating that he believed there was a change in ownership.

Mr. Robert Holland pointed out that this was his first time presenting this development before the Commission and said that he guessed there was a previous owner that received approval to develop 105 units and ninety-six parking spaces. Mr. Holland also reminded them that whoever buys the land can build that as a matter of right without having to come back to the

Commission, but he said that the new owners recognized that 96 parking spaces were not enough to make the property viable and asked to increase the parking to 196 spaces by adding one story, in addition to their plan to put parking underneath and outside the building, while staying within the property. He concluded by stating that the difference was the new ownership that had a different view of what will make the development work.

There being no additional discussion, the resolution passed by a 5-0 vote.

Vice Mayor Taylor	Yes
Commissioner Bass	Yes
Commissioner Davis	Yes
Commissioner Dominguez	Yes
Mayor Williams	Yes

3. **A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA, APPROVING A DEVELOPMENT AGREEMENT FOR THE CONSTRUCTION AND OPERATION OF A SELF-STORAGE FACILITY ON THE PROPERTY LOCATED AT 12940 NW 27TH AVENUE AND THE ADJACENT PARCEL LOCATED AT THE CORNER OF NW 129TH STREET AND NW 27TH AVENUE AND IDENTIFIED BY FOLIOS 08-2128-004-0031 AND 08-2128-004-0022, IN THE B-3 ZONING DISTRICT; PROVIDING FOR INCORPORATION OF RECITALS; PROVIDING FOR AN EFFECTIVE DATE.** *Sponsored by City Manager*

The above ordinance was read by Assistant City Attorney Candice Cobb.

It was moved by Vice Mayor Taylor, seconded by Commissioner Bass to discuss Agenda Item 15-A-3.

Mayor Williams opened the Public Hearing for Agenda Item 15-A-3.

City Clerk Flores stated that Ms. Elizabeth Adler had registered to address the Commission virtually on Agenda Item 15-A-3.

Ms. Elizabeth Adler introduced herself as the attorney for the applicant Gateway 2020 LLC. Ms. Adler said that she didn't have anything to add but wanted to let the Commission know that she was available if there were any questions after the City's presentation.

There being no additional members of the public to address the Commission, Mayor Williams closed the Public Hearing for Agenda Item 15-A-3.

Interim City Manager Williams asked Planning and Community Development Director Gregory Gay to introduce Agenda Item 15-A-3.

Planning and Community Development Director Gregory Gay informed the Commission that the proposed project was presented to them and approved approximately 2 years ago. Mr. Gay stated that the proposal was for a storage facility, approximately 5-stories in height with parking on the site and some minor retail related to the storage facility. He explained that the proposal was being brought back before the Commission because of a change in ownership that needed to be reflected within the development agreement. Mr. Gay said that the development agreement still included the minimum requirements for employment opportunities during the construction of the project and at the end. He also said that the storage facility will be at an entry point to the City and pointed out that they can see in the illustrations that the developer went to the maximum to continue reflecting the Moorish architecture that is well known within the City. Mr. Gay concluded by offering to address any questions or concerns.

Vice Mayor Taylor stated that he is not familiar with the property and asked if it used to be a car lot.

Planning and Community Development Director Gregory Gay stated that there are two car lots if you are going north from the property being proposed for development, and he specified that it is just to the north of Copart's and just to the south of the Wells Fargo bank building.

Vice Mayor Taylor asked if the proposed development would be three stories.

Planning and Community Development Director Gregory Gay explained that the exterior design of the proposed development would be three stories, but will have sub levels within the storage areas, and thus is really five levels.

Commissioner Davis asked if the resolution proposed by Agenda Item 15-A-3 was just a reconsideration of the development application.

Planning and Community Development Director Gregory Gay explained that the resolution proposed by Agenda Item 15-A-3 is to approve the development agreement for the self-storage facility. Mr. Gay said that there was another Agenda Item that included a reconsideration.

Commissioner Davis noted that no variance or special exemption was being requested and he asked if the proposed development is allowed based on the City's zoning code.

Planning and Community Development Director Gregory Gay reminded the Commission that when the proposed project was originally approved, there were two zoning categories and the property went through a zoning change for the southernmost property, to make it all consistently B2 zoning for this particular activity to occur.

Mayor Williams asked when the proposed development had been approved, acknowledging that he had said it was 2 years ago.

Planning and Community Development Director Gregory Gay stated that he didn't have the exact date, but that it was approximately 2 years ago when the proposed development had been approved.

Commissioner Davis stated that based on the information he was looking at, the applicant 3805 NW 132nd Street LLC requested site plan approval on May 26, 2021 and it was granted by the City Commission.

Mayor Williams stated that she is not in agreement with the development proposed by Agenda Item 15-A-3 and is going to vote no because she feels they are giving away prime property on 27th Avenue, which she pointed out is the corridor where people come in and out of the City. The Mayor said she didn't understand and is personally totally against continuing to develop storage units and factories.

Commissioner Davis stated that he is not a huge fan of gas stations, pawn stores, liquor stores or so many industrial and commercial businesses being developed in the City, but he said that he does understand that they have a zoning code that allows for those developments of property. The Commissioner said that if there's a special exception or variance being requested of the Commission, which is a different scenario. He went on to say that it appears that the zoning code basically says the applicant can operate a storage facility if they own the property, and even though he doesn't necessarily agree, he doesn't think it's a good idea to deny the

proposed development agreement, considering it could put the city into a situation with litigation somewhere down the road.

Mayor Williams asked City Attorney Norris-Weeks to speak on this.

City Attorney Norris-Weeks said that she wanted to weigh in after everybody had their say, and she agreed with Commissioner Davis that if it is allowed in the zoning district and City Staff is recommending it, the City should tread carefully in reviewing items that are allowed by the Code.

Planning and Community Development Director Gregory Gay pointed out that the proposed project has already been approved and is moving forward, with the only thing that has changed being the ownership, which he said is why the development agreement is being brought back before the Commission.

Interim City Manager Williams asked Planning and Community Development Director Gregory Gay to provide just a little bit more clarification for the Commission on what they are being asked to do.

Planning and Community Development Director Gregory Gay stated that the Commission was being asked to approve the development agreement for the site, re-stating that the project was already previously approved over a year ago and the proposed resolution basically reflects the new ownership that wishes to move forward with the development of the storage facility.

Interim City Manager Williams informed the Commission that the previous resolution which approved the proposed development, passed by a 5-0 vote.

Mayor Williams stated that she understands the way the area is zoned where the proposed development is located, but she asserted that the City does get some type of choice on what is placed on that particular spot, and she stressed that they need to be a little bit more diligent. The Mayor also stated that she wasn't on the Commission when the proposed development was originally approved.

There being no additional discussion, the resolution passed by a 5-0 vote.

Commissioner Bass	Yes
Commissioner Davis	Yes
Commissioner Dominguez	Yes

Vice Mayor Taylor	Yes
Mayor Williams	Yes

4. **A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA, APPROVING THE RE-APPLICATION REQUEST OF 3805 NW 132 STREET, LLC. TO REZONE PROPERTY LOCATED AT 3805 NW 132ND STREET, OPALOCKA, FLORIDA, IDENTIFIED BY FOLIO #08-2129-010-0090 FROM THE I-3 ZONING DISTRICT TO THE I-2 ZONING DISTRICT AS PERMITTED BY SECTION 22-49(P) THE CITY'S LAND DEVELOPMENT REGULATIONS PERTAINING TO RECONSIDERATION OF A PREVIOUSLY DENIED APPLICATION; PROVIDING FOR INCORPORATION OF RECITALS; PROVIDING FOR AN EFFECTIVE DATE.** *Sponsored by City Manager*

The above ordinance was read by Assistant City Attorney Candice Cobb.

It was moved by Commissioner Bass, seconded by Commissioner Davis to discuss Agenda Item 15-A-4.

Mayor Williams opened the Public Hearing for Agenda Item 15-A-4.

Ms. Hope Calhoun identified herself as the land development attorney for the owner of the property applying for rezoning. Ms. Calhoun informed the Commission that the request before them was not to consider the rezoning application, but just to set the rezoning hearing for a future date. She reminded the Commission that there was a hearing in May of last year during which the site plan and development agreement were approved by the Planning & Zoning Board and the City Commission, but the rezoning request failed by a 2-2 vote. Pointing out that the City's code provides the opportunity to re-apply after waiting a year, she acknowledged that there is only 1 month left until May but said that they've been trying to get this before the Commission for some time but didn't due to varied reasons.

Ms. Dorothy Johnson who resides at 13724 NW 22nd Place stated that she was glad Ms. Hope Calhoun made her statement on the record. Ms. Johnson pointed out that the short title for the resolution proposed by Agenda Item 15-A-4, is not alluding to I-2 zoning. She strongly suggested that the Commission be cautious because there is a lot of spot zoning, adding that it is the history of the City. Ms. Johnson urged the Commission to think about her example of going on to Miami-Dade County and a building that says

three stories is five. She also said that in her professional opinion, someone on the Planning & Zoning Board or City Staff should have caught some of it. Ms. Johnson recalled having collaborated with attorney Home Calhoun and she said that she knows her to be very detailed. She said that when it comes to land development, she only gets her learning equipment in the City of Opa-locka and added that she is just asking the Commission to look at it and make sure the rezoning is correct and according to what's on the legislation.

There being no additional members of the public to address the Commission, Mayor Williams closed the Public Hearing for Agenda Item 15-A-4.

Mayor Williams invited Planning and Community Development Director Gregory Gay to introduce Agenda Item 15-A-3.

Planning and Community Development Director Gregory Gay stated that the resolution proposed by Agenda Item 15-A-4 is basically for reconsideration of the zoning application to come back before the Commission. Mr. Gay confirmed that the site plan and development agreement were approved, but the rezoning failed by a 2-2 vote. He informed the Commission that the applicant is aware they could have waited another month and could have reapplied for the item, but the Staff from his Department has been working diligently and had intentions of bringing the item before the Commission earlier in the year, but unfortunately it was not able to be scheduled. Mr. Gay concluded by stating that his Department would like for the item to be reconsidered.

Mayor Williams asked what the purpose of spot zoning was, to change zones from I-3 to I-2.

Planning and Community Development Director Gregory Gay explained that the zoning for the site requesting rezonification is presently I-3 and he said that the property immediately adjacent to the north is zoned I-2, adding that zoning can be changed to the zoning of an adjacent property within a given distance requirement, and he pointed out that if that is done it is not considered spot zoning. Mr. Gay went on to say that the property owner is applying to change their zoning from I-3 to I-2, which would allow them to construct the recycling facility that is allowed in the I-2 zoning district but is not allowed in the I-3 zoning district. He also informed the Commission that because of the failure of the zoning change, the project was not allowed to move forward.

There being no additional discussion, the resolution passed by a 4-1 vote.

Commissioner Davis	Yes
Commissioner Dominguez	No
Vice Mayor Taylor	Yes
Commissioner Bass	Yes
Mayor Williams	Yes

B. APPEALS:

There were none.

16. ORDINANCES/RESOLUTIONS/PUBLIC HEARINGS:

A. FIRST READING ORDINANCE(S)/PUBLIC HEARING(S):

- 1. AN ORDINANCE OF THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA, AMENDING THE ANNUAL ADOPTED GENERAL, PROPRIETARY AND SPECIAL REVENUE FUNDS BUDGETS FOR THE FISCAL YEAR COMMENCING OCTOBER 1, 2021 AND ENDING SEPTEMBER 30, 2022, ADJUSTING REVENUES AND EXPENDITURES AS REFLECTED IN EXHIBIT “A”; PROVIDING FOR THE EXPENDITURE OF FUNDS ESTABLISHED BY THE BUDGET; AUTHORIZING THE CITY MANAGER TO TAKE CERTAIN ACTIONS; PROVIDING FOR APPROPRIATION OF ALL BUDGETS AND EXPENDITURES; PROVIDING FOR FEES CONSISTENT WITH APPROPRIATIONS AND AMENDMENT; PROVIDING FOR INCORPORATION OF RECITALS; PROVIDING FOR CONFLICT AND REPEALER; PROVIDING FOR SEVERABILITY; PROVIDING FOR AN EFFECTIVE DATE. *Sponsored by City Manager***

The above ordinance was read by Assistant City Attorney Candice Cobb.

It was moved by Commissioner Bass, seconded by Commissioner Davis to discuss Agenda Item 16-A-1.

Mayor Williams opened the Public Hearing for Agenda Item 16-A-1.

There being no members of the public to address the Commission, Mayor Williams closed the Public Hearing for Agenda Item 16-A-1.

Interim City Manager Darvin Williams asked Budget Administrator Bob Anathan to introduce Agenda Item 16-A-1.

Budget Administrator Bob Anathan delivered a presentation to the Commission on FY 22 Budget Amendment #3.

Commissioner Dominguez stated that the Commission approved the FY 22 budget amendment on February 23rd, and she asked what is being done to reduce the accrued lead payout for departing employees, which she noted was \$105,000.

Budget Administrator Anathan stated that the accrued lead payout for departing employees has been recognized as a problem but is not ready to come before the Commission because it has not been fully fleshed out, has come up in the labor negotiations and requires additional work from City Staff to have it addressed more forcibly.

Interim City Manager Darvin Williams informed the Commission that goals to address the accrued lead payout for departing employees are being worked on, and he asked that they allow for the policies and procedures to be put in place and be presented before them.

Commissioner Davis noted that a lot of the funding source for the proposed budget amendment, is coming from contingencies and vacancy savings and he asked for a little bit more detail on what vacancy savings is like and whether they were from positions in City Departments. The Commissioner also stated that he knows that based on the law established by the City Charter, a certain amount is encouraged to be kept in reserves, and he asked if the reserves are being tapped into.

Budget Administrator Anathan pointed out that vacancies do not eliminate positions that were funded for the full year, and he said that in some cases, they are projected to remain open and have created savings, adding that they should identify the use for other purposes. Mr. Anathan also said that \$236,000 are being used in this budget and that about \$154,000 of contingencies from the general fund is keeping it above the \$1 million threshold. He also pointed out that the way the City's code is written, it is recommended to start at \$1,000,001 but does allow the use of some of it throughout the year. Mr. Anathan concluded by stating that those were the primary sources being used to fund the proposed budget amendment.

Commissioner Davis stated that he understood the vacancy savings and he said that the Commission set the budget and its priorities by consensus, budgeting for those positions to fulfill a purpose and he said that he would personally like to see some of those positions filled, lamenting that he sees 12-line items associated with vacant positions.

Mayor Williams expressed concern over the expenditures for grant writing services, recalling that last year their fee was \$25,000 but she noted that it's now at \$35,000 and she wondered how it went up.

Budget Administrator Anathan informed the Commission that each grant application may be \$3,000 - \$5,000 and the \$25,000 that was budgeted for grant writing services, set a starting point and was not a flat rate for the service.

Mayor Williams stated her understanding that the grant writing services were not to exceed \$25,000.

Budget Administrator Anathan reminded the Commission that when the budget was originally passed, a price list was provided indicating what was going to be charged for each type of grant application. Mr. Anathan also reported that he believed the grant writing service has submitted six grants at this point and has gotten \$8.5 million for it, adding that they'd like to continue having those grants.

Mayor Williams asserted that she is just letting the Commission know that the presentation for the grant writing service is a little different now than it was before.

There being no additional discussion, the ordinance passed first reading by
a 5-0 vote.

Commissioner Domingue	Yes
Vice Mayor Taylor	Yes
Commissioner Bass	Yes
Commissioner Davis	Yes
Mayor Williams	Yes

B. SECOND READING ORDINANCE(S)/PUBLIC HEARING(S):

There were none.

C. RESOLUTION(S):

There were none.

17. CITY MANAGER'S REPORT:

Interim City Manager Darvin Williams stated that this was his first official Commission Meeting as City Manager and thanked the members of the Dais for the opportunity. As he began to share an update on the first week and the progress that has been made outside of the items that were on the Agenda, Manager Williams asserted that the administration will be about integrity and transparency and all actions taken will be in support of that principle. The Manager addressed some recent hirings, informing the Commission that he is in communication with the Florida Department of Law Enforcement, Ethics Department and Opa-locka's Internal Affairs, in addition to being in communication with Miami-Dade County later this month, and he said that it has come to his attention that some employees who are currently employed with the City, are under investigation for actions taken in their positions and some that were taken during non-work related activities. He reported that he has been made the first point of contact should a case be moved forward, including any employees that have been rehired. As part of his zero-tolerance policy for corruption, Mr. Williams said he will be publishing a memorandum from his office to inform all employees that if a case is presented to him by any of those agencies, it will be grounds for immediate termination, which he stated would be official notice and part of any due process returns. He also said that he wanted to convey to the Dais and put on record for the Citizens that may have some concerns, that he has an open-door policy for his office, and urged them to speak to him directly about any actions taken on behalf of the Citizens or the Commission. Additionally, Manager Williams shared his plan to establish a Citizens Committee which will meet twice per month, allowing the Citizens direct access to the City Manager's Office, where he said that with full transparency, he will present actions taken on behalf of the Dais, the Charter or City Ordinance, which affect them. He said that it will provide them a full opportunity to have discussions on matters that are non-legislative that sometimes make it to the Dais, and he added that it should make for a cleaner Commission meeting. Manager Williams concluded by announcing that he is also working with Miami-Dade County to move \$2.8 million in GOP funds to the City and said that a lot of progress is being made on that, adding that it should be completed in the next 30 to 45 days, wishing for much success on that.

Mayor Veronica Williams thanked Interim City Manager Darvin Williams and welcomed him to his first Commission Meeting.

City Attorney Norris-Weeks announced 3 Executive Session Meetings on April 27th at 6 PM, before the next Commission Meeting. The City Attorney provided notice that the first Executive Session Meeting is to discuss the matter of Union negotiations between the City of Opa-locka and the American Federation of State, County and Municipal Employees, the second Executive Session Meeting is to discuss the matter of Union negotiations between the City of Opa-locka and Dade County Police Benevolent Association, also known as South Florida Police Benevolent Association, and the third Executive Session Meeting is to discuss the matter of Case #122CV20537 in the United States Southern District Court, John Pate plaintiff versus the City of Opa-locka Et Al.

18. OFFICIAL BOARD REPORTS:

There were none.

19. FUTURE AGENDA ITEMS:

Commissioner Dominguez stated that she would like to direct the City Manager to expand the way communication about events is sent out to residents, via the water bill. The Commissioner acknowledged that flyers are distributed at schools, churches and resident buildings, but she said that she feels they'd have a bigger outcome if it was inside the water bill. She shared that resident who live in the area near the park where Bunny Jam was hosted, said they did not know about the event. Commissioner Dominguez also recognized that it is something all of the Commission Members have spoken about in the past, and she recalled speaking about it when she was a resident. She also said that having lived in Opa-locka for the past 26 years, she remembers that the City would put information inside the water bill in the past and doesn't understand why they cannot do it. The Commissioner concluded by asserting that residents need to know what's going on in the City, and not through social media because she said that a lot of them don't follow Opa-locka on social media and said that it's something they should think about.

Interim City Manager Darvin Williams asked Commissioner Dominguez to specifically provide the information that she would like to see in the water bill to see if it can be facilitated.

Commissioner Dominguez shared that she had provided the previous City Manager with a newsletter published by Tamarac and Miramar that she said, has so much information that she doubts a resident will come up to ask about an event or what's going on in the City with projects, new business or anything like that. The Commissioner said she has a copy and can give it to the Manager, and expressed her confidence that if everyone sees it, they will approve of it.

Interim City Manager stated that he looks forward to receiving the newsletter from Commissioner Dominguez and said that it couldn't be coming at a more perfect time because the City has a Request for Quotation for those types of services and will have an opportunity to engage potential vendors to assess their ability to get it done for the Commission.

Mayor Williams asked for guidance on whether Commissioner Dominguez's directive to City Manager Darvin Williams is a future agenda item or if it will just go into the Request for Quotation when the City gets a public relations firm. The Mayor said she was only asking because the Commission has said this multiple times for the 2 years she has been on the Dais.

City Attorney Norris-Weeks noted that Commissioner Dominguez made her proposal during the future agenda item section of the Agenda, and the Attorney said that the Commission's vote would be for the Manager to provide a report at the next meeting, on how Commissioner Dominguez's request can be done.

It was moved by Vice Mayor Taylor, seconded by Commissioner Dominguez to have Commissioner Dominguez's proposed Item to include information about City events in the water bill, added to a future Commission Meeting Agenda.

Commissioner Davis stated he wanted to provide a little bit of background, recalling that in the past there's been pushback the Commission has received from the Manager's Office to return to including information about City programs and services within the water bill because it was very expensive, which is why he said that at some point they moved away from it. The Commissioner shared Commissioner Dominguez's same sentiments and stated that it is obviously something that needs to happen but asked that other options be explored. He recognized that the manager spoke about the Request for Quotation, and the Commissioner also suggested that maybe it could be included in the public relations services. Commissioner Davis concluded by stating that he does support the idea.

There being no additional discussion, the motion to approve the Future Agenda Item passed by a 5-0 vote.

Vice Mayor Taylor	Yes
Commissioner Bass	Yes
Commissioner Davis	Yes
Commissioner Dominguez	Yes
Mayor Williams	Yes

Vice Mayor Taylor stated that he didn't know if it would be considered a future agenda item, but he wants legislation to be brought before the Commission to move forward with a plan for the American Rescue Plan Act funds. The Vice Mayor pointed out that the Commission had been presented with it last year, earlier this year and they have not yet moved.

City Attorney Norris-Weeks stated that she believed the plan for the American Rescue Plan Act funds came up at a prior meeting and the Commission may just be able to ask a question to the City Manager on what the status is.

Vice Mayor Taylor asked what the status was on the plan for the American Rescue Plan Act funds, adding that if there was no status update, he would want to make a motion for the City Manager to get that ball rolling so that the Commission has something on the Agenda by their next meeting.

City Attorney Norris-Weeks stated that Vice Mayor Taylor can make a motion to put the plan for the American Rescue Plan Act funds on the Commission Agenda but said that she didn't know if it would be necessary because they have already done that and said maybe the City Manager had a response.

Interim City Manager Darvin Williams stated that as part of his mission of integrity and transparency, he has set up one-on-one meetings with the Commissioners, but said that he unfortunately has been unable to meet with Vice Mayor Taylor before the meeting. The City Manager said that he is more than happy to provide an update on the plan for the American Rescue Plan Act funds and informed the Commission that they have until December 24th of this year to allocate and encumber those funds. He went on to stated that his Office has reviewed the class 2 plans from the Pate administration to see if those are appropriate allocations for the funds and to make a recommendation for the Commission to review, and said that a request for a workshop will be made within the next 30 days, so that the Commission can provide feedback on how the allocations should go forward.

Commissioner Davis stated that Kaboom Park was a project that was developed by a local nonprofit in partnership with the City over the years and has been a work in progress. The Commissioner said that ultimately, the community came together to bridge resources and put a project like that together. He went on to say that now having more of a role in the City as an elected official, in consideration of his work throughout the project's history and the challenges that were faced while developing it, he would like for it to be designated as an official Miami-Dade County park. Commissioner Davis acknowledged that there are a lot of moving parts to see that into fruition, but he made a motion as a future agenda item to direct the City Manager's Office to obtain that designation. He recognized that Mayor Williams has held several community cleanups there and he said that she knows the need is definitely there because the City doesn't have official trash pickup because it is not recognized as an official Miami-Dade County park. He also asserted that the City needs to do something more sustainable down the line because they would still like to see the park site clear and accessible for families that live in the area when they are not on the Commission to press the issue.

Interim City Manager Williams stated that his Office would absolutely love to move forward on working to obtain an official designation as a Miami-Dade County park for Kaboom Park.

Mayor Williams thanked Commissioner Davis for proposing his future agenda item to designate Kaboom Park as an official Miami-Dade County park. Acknowledging him as the Member who has been on the Commission the longest, the Mayor thanked him for his leadership and said he is absolutely correct that they have had several cleanups. She shared that she does spend a lot of time in that area, and asserted that the City definitely needs to

make sure that they keep their eyes laser focused on not just a certain area of Opa-locka, but all areas with Kaboom Park being one because she said that Magnolia North is going to be the new up-and-coming area of distinction, which she added they are so happy to know.

Vice Mayor Taylor and Mayor Williams requested to co-sponsor Commissioner Davis' future agenda item directing the City Manager to work to obtain an official designation as a Miami-Dade County park for Kaboom Park.

It was moved by Commissioner Davis, seconded by Vice Mayor Taylor to include an Item directing the City Manager to work to obtain an official designation as a Miami-Dade County park for Kaboom Park, as an Item on a future Commission Meeting Agenda.

There being no additional discussion, the motion to approve the Future Agenda Item passed by a 5-0 vote.

Commissioner Davis	Yes
Commissioner Dominguez	Yes
Vice Mayor Taylor	Yes
Commissioner Bass	Yes
Mayor Williams	Yes

20. MAYOR/COMMISSION REPORTS:

Vice Mayor Taylor thanked everybody that supported and helped bring the Bunny Jam together the previous Saturday, where he said over two hundred children received Easter baskets. The Vice Mayor said that despite it being really hot out there, they had a lot of fun and he thanked Mayor Williams and Commissioner Dominguez for coming out.

Commissioner Dominguez highly recommended the Build Better Opa-locka app. The Commissioner shared that she saw a pile of tires in an alley and instead of calling the City Manager, she decided to give the app a try. She said that all she had to do was make sure she had her location on, take a picture, upload it and answer a couple of questions regarding what she was reporting and 3 days later the issue was taken care of. Commissioner Dominguez thanked the Information Technology team for coming up with the great idea, as well as the Code Enforcement and Public Works Departments for getting the job done. The Commissioner added that the only thing she would suggest is putting a before and after picture, so that people can be encouraged by seeing it looks different.

Mayor Williams said that she had a blast at the Egg-normous Bunny Jam and that it was great weather, thanking Vice Mayor Taylor, Commissioner Dominguez and the Opa-locka Booster Club. The Mayor also announced that she partnered with the American Red Cross

to deliver free smoke alarms to any resident, and she stated that the American Red Cross will go to the homes of residents that want it installed. She invited residents to join them at the Helen Miller Center from 10 AM to 2 PM on Friday, April 22nd and said they can save lives. The Mayor pointed out that there's been a lot of fires recently and they want to make sure they prevent accidental fires, especially with Seniors. She also said that she wanted to read for the record, Section 2.5 of the City's Code, under Commission powers, which states that the Board can inquire into the conduct of the Offices, Departments and Agencies of the City and investigate municipal affairs. Mayor Williams asserted that she knows she is definitely smarter than a 5th grader and said with her 3 degrees and having just been accepted into the doctoral program, she stated that she knows how to read and said that the Commission has that power to inquire.

Commissioner Dominguez stated that she wanted to know if the City Clerk or the Parks & Recreation Department keeps the calendar for special events, because she wants to avoid any conflicts for her event on May 7th and wants to make sure that it's booked for that day.

Mayor Veronica Williams asked Interim City Manager Darvin Williams if he would like to answer Commissioner Dominguez's question about who keeps the calendar for special events, because she said that she herself has an event on May 6th.

Interim City Manager Darvin Williams stated that his Office is currently receiving and approving all special events, and he offered to prepare a calendar with all projected events, so that they can see with full transparency any events that have been booked by their colleagues.

Commissioner Dominguez stated her understanding that Interim City Manager Darvin Williams was saying that the Commission is going to have a calendar where they can all see who booked what, where and when.

Interim City Manager Darvin Williams confirmed that his Office will provide the Commission with a special events calendar and offered to deliver it to them as part of their weekly meetings.

Mayor Veronica Williams asked Interim City Manager Darvin Williams to share the events that the Commission already approved a year ago.

Interim City Manager Darvin Williams confirmed that his Office abides by the events that were already approved by the Commission.

21. OFFICIAL BOARD APPOINTMENTS:

City Clerk Flores informed the Commission that they were provided with a Board application from Deacon Eugene Stanley for the Community Relations, Recreation and

Activities Board, which she pointed out is an individual appointment. The Clerk reminded the Commission that the back of their Agenda includes a list of which Members have an appointment available to that Board. She also informed them that they have an application from Enyer Martinez, for an individual appointment to the Civil Service Board.

Mayor Williams appointed Deacon Stanley to the Community Relations, Recreation and Activities Board.

Commissioner Davis noted that the Commission has two individual appointments available to be made to the Civil Service Board and asked if there are three standing Members on the Board.

City Clerk Flores explained that there are a total of 5 Members on the Civil Service Board, with each member of the Commission having one individual appointment. The Clerk went on to say that there are currently three individuals that were appointed to the Board and there are two vacancies, with are available for Vice Mayor Taylor and Mayor Williams to appoint.

Commissioner Davis asked if the Civil Service Board has a quorum for their meetings.

City Clerk Flores informed the Commission that the Civil Service Board has not been meeting and has been inactive. The Clerk pointed out that per City Code, the City Manager is to appoint a Board Clerk, and she said that she is not sure if that has been done at this point.

Mayor Williams stated that the Commission would review and vet the application for Enyer Martinez to serve on the Civil Service Board.

City Clerk Flores informed the Commission that Nikitta Nixon is currently on the Historic Preservation Board, having been appointed based on her previous qualification as a Resident of Opa-locka, but has since moved out of the City. The Clerk stated that the Commission has the option to consider appointing Ms. Nixon to the Board on the basis of civic pride, integrity, experience and interest in the field of historic preservation. She said that the Commission can consider Ms. Nixon's appointment during the current Meeting or at a future Meeting.

Vice Mayor Taylor asked if Nikitta Nixon wants to remain on the Historic Preservation Board.

City Clerk Flores stated that it is her understanding that Nikitta Nixon wants to continue serving on the Historic Preservation Board.

Vice Mayor Taylor asked if there would be a vacancy for a Resident on the Historic Preservation Board.

City Clerk Flores confirmed that if the Commission votes to change her appointment based on her qualification as a Resident to the basis of civic pride, integrity, experience and interest in the field of historic preservation, they would have a vacancy that can be filled by a Resident.

It was moved by Vice Mayor Taylor, seconded by Commissioner Davis to appoint Nikitta Nixon to the Historic Preservation Board on the basis of civic pride, integrity, experience and interest in the field of historic preservation.

There being no additional discussion, the appointment passed by a 5-0 vote.

Commissioner Dominguez	Yes
Vice Mayor Taylor	Yes
Commissioner Bass	Yes
Commissioner Davis	Yes
Mayor Williams	Yes

22. ADJOURNMENT:

Mayor Williams concluded the Regular Commission Meeting by stating that in the spirit of former First Lady Michelle Obama, “when they go low, we stay high.”

There being no further business to come before the City Commission, the Mayor adjourned the Meeting at 9:17 p.m.

Veronica J. Williams
Mayor

Attest:

Joanna Flores, CMC
City Clerk

CONSENT AGENDA

RESOLUTION NO. _____

A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA, AUTHORIZING THE CITY MANAGER TO ISSUE A REQUEST FOR PROPOSALS (RFP) FOR DRAINAGE CLEANING AND CCTV INSPECTION OF CITY MUNICIPAL STORM SEWER SYSTEM; PROVIDING FOR INCORPORATION OF RECITALS; PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the City of Opa-Locka ("City") has 31 miles of underground storm drainage mains. Due to lack of funding in recent years, this drainage system hasn't received the extensive ongoing maintenance necessary for the system to operate efficiently. As a result there has been a buildup of debris, possible unidentified main failure due to age and external forces and also root penetration of the mains, all of which impede the system from effectively conveying stormwater run-off away from City streets; and

WHEREAS, to improve the effectiveness of the City's stormwater drainage system, the City Manager recommends the City Commission authorize the City Manager to issue an RFP for services to inspect, clean and make repairs to this system; and

WHEREAS, the City desires to issue a Request for Proposal ("RFP") for Drainage Cleaning and CCTV Inspection of City Municipal Storm Sewer System; and

WHEREAS, this RFP will result in the engagement of a firm which will inspect all mains through the use of closed-circuit television (CCTV), remove all debris impeding flow, remove roots which have penetrated the mains and repair the damage caused by this intrusion and otherwise repair the mains as necessary; and

WHEREAS, the City Commission authorizes the City Manager to issue a RFP for the Drainage Cleaning and CCTV Inspection of City Municipal Storm Sewer System and further authorizes the spending of up to three thousand dollars (\$3,000) for advertising purposes, if deemed appropriate.

NOW THEREFORE, BE IT RESOLVED BY THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA:

Section 1. RECITALS ADOPTED.

The recitals to the preamble herein are incorporated by reference.

Section 2. AUTHORIZATION

The Commission of the City of Opa-Locka, Florida hereby authorizes the City Manager to issue an RFP, attached hereto as Exhibit "A", for qualified and experienced firms and further authorizes spending of up to three thousand dollars (\$3,000) for advertising purposes, if deemed appropriate.

Section 3. SCRIVENER'S ERRORS.

Sections of this Resolution may be renumbered or re-lettered and corrections of typographical errors which do not affect the intent may be authorized by the City Manager, or the City Manager's designee, without need of public hearing, by filing a corrected copy of same with the City Clerk.

Section 4. EFFECTIVE DATE.

This Resolution shall take effect immediately upon adoption and is subject to the approval of the Governor or his designee.

PASSED AND ADOPTED this ____ day of _____, 2022.

Veronica J. Williams, Mayor

ATTEST:

Joanna Flores, City Clerk

**APPROVED AS TO FORM AND
LEGAL SUFFICIENCY:**

Burnadette Norris-Weeks, P.A.
City Attorney

Moved by: _____

Seconded by: _____

VOTE:

Commissioner Bass	_____ (Yes)	_____ (No)
Commissioner Davis	_____ (Yes)	_____ (No)
Commissioner Dominguez	_____ (Yes)	_____ (No)
Vice-Mayor Taylor	_____ (Yes)	_____ (No)
Mayor Williams	_____ (Yes)	_____ (No)



City of Opa-locka Agenda Cover Memo

City Manager:	Darvin Williams		CM Signature:				
Commission Meeting Date:	05.11.2022		Item Type: <i>(Enter X in box)</i>	Resolution	Ordinance	Other	
				X			
Fiscal Impact: <i>(Enter X in box)</i>	Yes	No	Ordinance Reading: <i>(Enter X in box)</i>	1st Reading		2nd Reading	
			Public Hearing: <i>(Enter X in box)</i>	Yes	No	Yes	No
					X		X
Funding Source: <i>Account# :</i>	<i>(Enter Fund & Dept)</i> Ex:		Advertising Requirement: <i>(Enter X in box)</i>	Yes		No	
						X	
Contract/P.O. Required: <i>(Enter X in box)</i>	Yes	No	RFP/RFQ/Bid#:				
	X						
Strategic Plan Related <i>(Enter X in box)</i>	Yes	No	Strategic Plan Priority Area: Enhance Organizational ☐ Bus. & Economic Dev ☒ Public Safety ☒ Quality of Education ☐ Qual. of Life & City Image ☒ Communication ☐	Strategic Plan Obj./Strategy: <i>(list the specific objective/strategy this item will address)</i>			
	X						
Sponsor Name	City Manager		Department:	City Manager			

Short Title:

A resolution authorizing the City Manager to issue an RFP to clean, inspect and repair the City's Municipal Storm Sewer System (MS4).

Staff Summary:

Issue / Recommendation – To improve the effectiveness of the City's stormwater drainage system, staff recommends the City Commission authorize the City Manager to issue an RFP for services to inspect, clean and make repairs to this system.

History – The City has 31 miles of underground storm drainage mains. Due to lack of funding in recent years, this drainage system hasn't received the extensive ongoing maintenance necessary for the system to operate efficiently. As a result there has been a buildup of debris, possible unidentified main failure due age and external forces and also root penetration of the mains, all of which impede the system from effectively conveying stormwater run-off away from City streets.

Current Activity – Due to placement of stormwater fees as an assessment on the annual property tax bill, rather than on the utility bill as had previously been done, all properties are now paying their fair share of the maintenance and improvement of the stormwater drainage system. This has resulted in an annual increase in stormwater revenue in the range of \$0.9 million. This additional funding allows the City to restart a robust maintenance program to restore the effectiveness of this system. American Rescue Plan Act (ARPA) funding may be also be available for this project depending on the Commission prioritization of projects to be funded by ARPA funding.

This RFP will result in the engagement of a firm which will inspect all mains through the use of closed-circuit television (CCTV), remove all debris impeding flow, remove roots which have penetrated the mains and repair the damage caused by this intrusion and otherwise repair the mains as necessary. It isn't anticipated that the entire drainage system will be addressed within one year. It should also be noted that when the drainage system is restored to optimum effectiveness, flooding should be significantly reduced, but not eliminated, with further significant investment required to greatly eliminate flooding within the City.

Financial Impact – As discussed, the City now has funding sources which will allow this program to move forward at a significant pace, although the exact rate of progress won't be known until the bids have been evaluated. As a measure of the cost to be expected, 1,500 feet of Sharazad recently received these service at a cost of approximately \$41,000, which translates into \$144,000 per mile. It is believed that the conditions found in this section of the Sharazad drainage system may be somewhat worse than the average condition of the total system, suggesting a somewhat lower cost per mile overall. The RFP will be issued electronically but may be also be advertised, which could require up to \$3,000. An Advertising budget is available within the General Fund Non-Department division for this purpose if needed.

Proposed Action:

Staff recommends the City Commission authorize the City Manager to issue an RFP to clean, inspect and repair the City's Municipal Storm Sewer System (MS4) and further authorize the spending of up to \$3,000 for advertising purposes if deemed appropriate.

Attachment:

Draft RFP

City of Opa-locka



RFP NO: 22-XXXXXXX

REQUEST FOR PROPOSAL (RFP)

**CLEAN, INSPECT AND REPAIR THE CITY'S
MUNICIPAL STORM SEWER SYSTEM (MS4)**



CITY OF OPA-LOCKA
RFP NO. 22-XXXXXXX

CLEAN, INSPECT AND REPAIR THE
CITY'S MUNICIPAL STORM SEWER SYSTEM (MS4)

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CITY OF OPA-LOCKA
REQUEST FOR PROPOSALS
RFP NO: 22-XXXXXXX

CLEAN, INSPECT AND REPAIR THE CITY'S MUNICIPAL STORM SEWER SYSTEM (MS4)

Sealed Proposals for Clean, Inspecting and Repairing the City's Municipal Storm Sewer System (MS4) will be received by the City of Opa-locka at the Office of the City Clerk, 780 Fisherman St, 4th Floor, Opa-locka, Florida 33054, **Wednesday, June XX, 2022 by 2:00 p.m.** Any RFP Package received after the designated closing time will be returned unopened. The City of Opa-locka will be accepting proposals by mail, however it is your responsibility to submit your proposal by the due date. In addition, proposals may be submitted via www.demandstar.com (e-bid). The address to submit sealed proposals is listed below:

CITY OF OPA-LOCKA
Office of the City Clerk
780 Fisherman Street, 4th Floor
Opa-locka, Florida 33054

An original and six (6) copies for a total of seven (7) plus 1 copy of the Proposal package on USB Flash Drive in PDF format shall be submitted in sealed envelopes/packages addressed to the City Clerk, City of Opa-locka, Florida, and marked **RFP for Clean, Inspect and Repair the City's Municipal Storm Sewer System (MS4)**.

Proposers desiring information for use in preparing proposals may obtain a set of such documents by visiting the City's website at www.opalockafl.gov or www.demandstar.com.

The City reserves the right to accept or reject any and all proposals and to waive any technicalities or irregularities therein. The City further reserves the right to award a contract to that proposer whose proposal best complies with the **RFP NO: 22-XXXXXXX** requirements. Proposers may not withdraw their proposal for a period of ninety (90) days from the date set for the opening thereof.

A pre-bid meeting will be held on **Thursday, May XX, 2022 at 10:00 a.m.** at 780 Fisherman Street, Ste. 220, Opa-locka, FL 33054 and via zoom.

To participate via Zoom, please use the call-in information listed below:

City Clerk
Joanna Flores, CMC



CITY OF OPA-LOCKA

RFP NO. 22-XXXXXXX

CLEAN, INSPECT AND REPAIR THE CITY'S MUNICIPAL STORM SEWER SYSTEM (MS4)

PART I

PROPOSAL GUIDELINES

Introduction: The City of Opa-locka is requesting proposals from qualified professional companies to provide service to **Clean, Inspect and Repair the City's Municipal Storm Sewer System (MS4)**.

1-2. Proposal Submission and Withdrawal: The City of Opa-locka will be accepting proposals by mail, however it is your responsibility to submit your proposal by the due date. In addition, proposals may be submitted via www.demandstar.com (e-bid). The City must receive all proposals by 2:00 pm on Wednesday, June XX, 2022. The address to submit sealed proposals is listed below:

CITY OF OPA-LOCKA
Office of the City Clerk
780 Fisherman Street, 4th Floor
Opa-locka, Florida 33054

To facilitate processing, please clearly mark the outside of the proposal package as follows: **RFP NO. 22-XXXXXXX – Clean, Inspect and Repair the City's Municipal Storm Sewer System (MS4)**. This package shall also include the Proposer's return address.

Proposers may withdraw their proposals by notifying the City in writing at any time prior to the deadline for proposal submittal. After the deadline, the proposal will constitute an irrevocable offer, for a period of 90 days. Once opened, proposals become a record of the CITY and will not be returned to the Proposer.

The City cautions proposers to assure actual delivery of mailed or hand-delivered proposals directly to the City Clerk's Office at 780 Fisherman Street, 4th Floor, Opa-locka, Florida 33054 prior to the deadline set for receiving proposals. Telephone confirmation of timely receipt of the proposal may be made by calling (305) 688-4611 before proposal closing time. Any proposal received after the established deadline **will not** be considered and will be returned unopened to the Proposer(s).

1-3. Number of Copies: Proposers shall submit an **original and six (6) copies (a total of 7) plus one copy on CD in PDF format** of the proposal in a sealed, opaque package marked as noted above. The Proposer will be responsible for timely delivery, whether by personal delivery, US Mail or any other delivery medium.

1-4. Development Costs: Neither the City nor its representatives shall be liable for any expenses

incurred in connection with preparation of a response to this Request for Proposal. Proposers should prepare their proposals simply and economically, providing a straightforward and concise description of the Proposer's ability to meet the requirements of the RFP.

1-5. Inquiries: The City Clerk will receive written requests for clarification concerning the meaning or interpretations of the RFP, until eight (8) days prior to the submittal date. City personnel are authorized only to direct the attention of prospective Proposers to various portions of the RFP so that they may read and interpret such for themselves. No employee of the City is authorized to interpret any portion of this RFP or give information as to the requirements of the RFP in addition to what is contained in the written RFP document.

1-6. Addendum: The City may record its response to inquiries and any supplemental instructions in the form of written addenda. The CITY may mail written addenda up to three (3) calendar days before the date fixed for receiving the proposals. Proposers shall contact the City to ascertain whether any addenda have been issued. Failure to do so could result in an unresponsive proposal. Any oral explanation given before the RFP opening will not be binding.

All Proposers are expected to carefully examine the proposal documents. Any ambiguities or inconsistencies should be brought to the attention of the City's Purchasing Agent through written communication prior to the opening of the proposals.

1-7. Contract Awards: The City anticipates entering into an Agreement with the Proposer who submits the proposal judged by the City to be most advantageous.

The Proposer understands that this RFP does not constitute an offer or an Agreement with the Proposer. An offer or Agreement shall not be deemed to exist and is not binding until proposals are reviewed, accepted by appointed staff.

The City reserves the right to reject all proposals, to abandon the project and/or to solicit and re-advertise for other proposals.

1-8. Contractual Agreement: This RFP and Consultant/Contractor proposal shall be included and incorporated in the final award. The order of contractual precedence will be the Contract or Agreement document, original Terms and Conditions, and Proposer response. Any and all legal action necessary to enforce the award will be held in Miami-Dade County and the contractual obligations will be interpreted according to the laws of Florida. **Any additional contract or agreement requested for consideration by the Proposer must be attached and enclosed as part of the proposal.**

1-9. Selection Process: The proposals will be evaluated and assigned points. The firm with the highest number of points will be ranked first; however, nothing herein will prevent the City from assigning work to any firm deemed responsive and responsible.

The City reserves the right to further negotiate any proposal, including price, with the highest rated Proposer. If an agreement cannot be reached with the highest rated Proposer, the City reserves the right to negotiate and recommend award to the next highest Proposer or subsequent Proposers until an agreement is reached.

1-10. Public Records: Upon award recommendation or ten (10) days after opening, whichever occurs first, proposals become "public records" and shall be subject to public disclosure consistent with Chapter 119 Florida Statutes. Proposers must invoke the exemptions to disclosure provided

by law in the response to the RFP, and must identify the data or other materials to be protected, and must state the reasons why such exclusion from public disclosure is necessary. Document files may be examined, during normal working hours.

1-11. News Releases: The Proposer shall obtain the prior approval of the City Manager's Office of all news releases or other publicity pertaining to this RFP or the service, study or project to which it relates.

1-12. Insurance: The awarded Proposer(s) shall maintain insurance coverage reflecting at least the minimum amounts and conditions specified herein. In the event the Proposer is a governmental entity or a self-insured organization, different insurance requirements may apply. Misrepresentation of any material fact, whether intentional or not, regarding the Proposers' insurance coverage, policies or capabilities may be grounds for rejection of the proposal and rescission of any ensuing Agreement.

1. Evidence of General Liability coverage with limits not less than \$1,000,000 per Occurrence/ \$2,000,000 Aggregate (Including Policy Number and Policy Period);
2. Evidence of Auto Liability coverage with limits not less than \$1,000,000 per Occurrence/\$1,000,000 Aggregate (Including Policy Number and Policy Period);
3. Evidence of Workers' Compensation coverage with statutory limits and Employer's Liability coverage with limits not less than \$100,000 (Including Policy Number and Policy Period);
4. The City listed as an additional insured (this may be specifically limited to the specific job(s) the contractor will be performing);
5. Minimum 30-day written notice of cancellation.

1-13. Licenses: Proposers, both corporate and individual, must be fully licensed and certified in the State of Florida at the time of RFP submittal. The proposal of any Proposer who is not fully licensed and certified shall be rejected.

1-14. Public Entity Crimes: Award will not be made to any person or affiliate identified on the Department of Management Services' "Convicted Vendor List". This list is defined as consisting of persons and affiliates who are disqualified from public contracting and purchasing process because they have been found guilty of a public entity crime. No public entity shall award any contract to, or transact any business in excess of the threshold amount provided in Section 287.017 Florida Statutes for Category Two (currently \$25,000) with any person or affiliated on the "Convicted Vendor List" for a period of thirty-six (36) months from the date that person or affiliate was placed on the "Convicted Vendor List" unless that person or affiliate has been removed from the list. By signing and submitting the RFP proposal forms, Proposer attests that they have not been placed on the "Convicted Vendor List".

1-15. Code Of Ethics: If any Proposer violates or is a party to a violation of the code of ethics of the City of Opa-locka or the State of Florida with respect to this proposal, such Proposer may be disqualified from performing the work described in this proposal or from furnishing the goods or services for which the proposal is submitted and shall be further disqualified from submitting any future proposals for work, goods or services for the City of Opa-locka.

1-16. Drug-Free Workplace: Preference shall be given to businesses with Drug-Free Work Place (DFW) programs. Whenever two or more proposals which are equal with respect to price, quality, and service are received by the City for the procurement of commodities or contractual services, a proposal received from a business that completes the attached DFW form certifying that it is a DFW shall be given preference in the award process.

1-17. Permits and Taxes: The Proposer shall procure all permits, pay all charges, fees, and taxes, and give all notices necessary and incidental to the due and lawful prosecution of the work.

1-18. Protests: Protests of the plans, specifications, and other requirements of the request for proposal and bids must be received in writing by the City Clerk's Office at least ten (10) working days prior to the scheduled bid opening. A detailed explanation of the reason for the protest must be included. Protests of the award or intended award of the bid or contract must be in writing and received in the City Clerk's Office within seven (7) working days of the notice of award. A detailed explanation of the protest must be included.

1-19. Termination for Convenience: A contract may be terminated in whole or in part by the City at any time and for any reason in accordance with this clause whenever the City shall determine that such termination is in the best interest of the City. Any such termination shall be affected by the delivery to the contractor at least five (5) working days before the effective date of a Notice of Termination specifying the extent to which performance shall be terminated and the date upon which termination becomes effective. An equitable adjustment in the contract price shall be made for the completed service, but no amount shall be allowed for anticipated profit on unperformed services.

PART II

MINIMUM SPECIFICATIONS

1. GENERAL REQUIREMENTS:

1.1. The intent of this proposal is to provide a source for Stormwater System Clean using high pressure hydro-jetting, Video Inspection (CCTV) Services and stormwater system repairs. This contract will cover both scheduled clean and emergency, afterhours unplugging to re-establish stormwater flow. The City of Opa-locka Public Works Department shall pre-set monthly schedules and task work orders for clean and video services performed during normal business hours. Public Works Department shall assign stormwater jobsites needing repair and approve schedules, plans and cost proposals to complete the assigned repair jobsites.

1.2. The storm drain system clean and video inspection services provided shall be all-inclusive of written video reports and DVD's, jobsite mobilization and traffic control for scheduled work, labor, materials, tools, signage, equipment, and supervision. The stormwater system repair jobsites assigned shall be all-inclusive of jobsite mobilization, traffic control, labor, materials tools, signage, equipment, supervision, and any required plans, sketches and cost proposals.

1.3. The primary user of this contract will be the City of Opa-locka Public Works Department – which is responsible for the City's stormwater infrastructure maintenance. Other departments may also use this contract periodically.

1.4. The Contractor, upon request from the Public Works Department, shall perform hydro-jetting and vacuuming of material from storm drain pipes and structures. Mechanical clean may be required on pipes and structures designated by the Public Works Department as needing heavy clean (50 to 100% blocked). Excavation of culvert and pipe entrance/exit ditches that may require haul-off of excess material is also included.

1.5. Normal business hour service shall be provided to the City between the hours of 8:00 AM and 5:00 PM, Monday through Friday, excluding City holidays. Service calls performed outside these time parameters shall be considered afterhours, emergency work. The Contractor shall be notified by the Public Works Department as to any emergency site of the storm drain system. The Contractor shall respond within two (2) hours on-site after receiving the service call for an afterhours/emergency jobsite. A 24-hour call center will be required from the Contractor.

1.6. The Contractor shall adhere to the bounds as set forth in all right-of-ways and easements unless prior written approval of the current property owner is obtained and submitted to the Public Works Department for approval. A standardized right-of-entry form will be used.

1.7. The hydro-jetting and video inspection equipment shall be truck mounted for roadway work and smaller easement units will be used for easy access to various locations within the City.

1.8. Sonar equipment for the location of buried junctions is part of this scope of services. The Contractor shall also have the capacity to uncover and raise pre-cast concrete and masonry boxes to grade level. Also, hydro-excavation may be required on some jobsites.

1.9. The stormwater drainage system repair items are all installed costs for each item or operation per the *Florida Department of Transportation (FDOT) Standard Specifications*.

2. TECHNICAL SPECIFICATIONS:

2.1. Hydro-jet Clean Equipment and Standards.

2.2. Equipment Types. At least one unit shall be a truck mounted heavy-duty unit and at least one unit of smaller easement type equipment for the hydro-jet clean of storm drains will be made available to service this contract.

2.3. Equipment Capacity. The heavy-duty hydro-jet clean equipment shall be capable of 2000 psi min to 4000 psi max and up to 100 gallons per minute of water flow at the nozzle.

2.4. Hoses. Hose sizes shall range from 3/16-inch to 24-inches in diameter to accommodate the various storm drain pipe diameters.

2.5. Vacuum Fan. Vacuum shall be a twenty-seven (27) inch fan (or equivalent) configuration due to the required removal of large material from storm drains.

2.6. Flow Nozzles. Guided flow nozzles and cutting nozzles shall be used that are capable of cutting through tree roots, concrete, grease, mortar, sand, gravel, dirt, sludge and debris and shall protect the integrity of the storm drain pipe.

2.7. Water Tanks and Supply. The water tank shall be capable of a carrying capacity of 1500 gallons and a debris box with a minimum capacity of 6 cubic yards. The Contractor is responsible for supply and cost of water.

2.8. Heavy Clean. Heavy clean (mechanical clean) may be required on all 50% to 100% full structures and storm drain lines prior to the final hydro-jet treatment.

2.9. Storm Drain Clean. Drain Clean and clearing shall consist of clearing a stoppage and then going back and forth through the stoppage area as well as the entire line being cleaned. This will ready the storm drain for CCTV inspection equipment by exposing the full pipe circumference. All solids shall be removed at the downstream structure of the section being cleaned – passing material from one pipe segment to another will not be permitted.

2.10. Damage to Contractor's Equipment. The City shall not be responsible for broken cables or hoses while either clean a system or attempting to unclog one. The Contractor must exercise caution when hydro-jetting any line.

2.11. Traffic Control. All required traffic control will be in accordance with the Manual of Uniform Traffic Control Devices (MUTCD), 2011 edition, and will be considered appurtenance to the work at no additional cost to the City with the exception of emergency jobsites.

2.12. Hours of Operation. All clean and video inspections (CCTV) will be performed during normal business hours (Monday through Friday and 8:00 am to 5:00 pm). A 24-hour call center phone number will be provided to the City Engineer.

2.13. Mobilization charges. Mobilization charges will be allowed for afterhours and emergency jobsites only. An additional per hour charge will be allowed in emergency cases.

2.14. Schedules. The Public Works Department will hold monthly planning and scheduling meetings to provide preset monthly schedules and task work orders for clean operations during normal business hours. GIS maps of work locations shall also be provided to the Contractor by the Public Works Department. In advance of the work (3 days minimum in advance of actual start), the Contractor shall provide to the Public Works Department the Proposed Work Plan for review and approval that shall include a Cost proposal, storm drain flow bypass/dewatering plans, traffic control plans, signed right-of-entry forms and proposed clean and inspections methods. Contractor shall notify the Public Works Department of any discrepancies in pipe configurations in the field if different from those on the GIS maps provided. Notification shall include a diagram clearly indicating actual locations of structures in relation to adjacent existing structures.

2.15. Certifications. The hydro-jetting equipment operator shall hold a current Commercial Driver's License (CDL) with Tanker Endorsement. Copies of the operator's license shall be included in the bid package for review to help determine if a sufficient amount of qualified staff is available to service this contract.

3. VIDEO INSPECTION SERVICES:

3.1. Video Inspection. Video Inspection Services will begin once a storm drain is thoroughly cleaned and the full pipe circumference is visible. Video Inspection (CCTV) Services will be performed on designated storm drain system as determined by the Public Works Department. The inspection and assessment will be performed, at a minimum, in accordance with the Pipeline Assessment Certification Program. The Contractor shall furnish all labor, materials, and equipment necessary for the CCTV inspection and condition assessment of the pipes and structures. CCTV equipment shall be capable of providing a high-quality CCTV inspection and record of the inspection. The Contractor must allow, when warranted, the Public Works Department to be present inside the camera truck during video inspection to view inspection process and provide direction when anomalies are encountered.

3.2. By-pass pumping. By-pass pumping of stormwater may be required on some jobsites to control the storm flows while the camera is working. Water shall be released in a manner to prevent erosion of property.

3.3. Video Reports. A complete Video Inspection (CCTV) Service Report will be labeled with jobsite street addresses and copies of the bound, written inspection that highlight any anomalies or defects. The CCTV inspection will be placed on DVD disks and will be supplied to the Public Works Department for our records. Database files from each inspection will be delivered in PACP format. DVD disks will be compatible for viewing on Windows Media Player. Video reports will be due within 7 days of final inspection of assigned stormwater drainage system.

3.4. Quality of Report Submittals. Submit DVD and written Inspection Reports for quality review and comments to the Public Works Department. Picture quality and definition shall be to the satisfaction of the City. Inspection equipment that fails to produce satisfactory inspection quality shall be removed and replaced.

3.5. Sonar Location Services. Pipe Location Services may be required by a sonar inspection to locate buried junctions and identify pipe alignments. Buried structures will be marked with white paint and white flagged for excavation by the Contractor or City crews.

3.6. Inspection Equipment. The video inspection equipment shall meet the minimum standards of this section.

3.6.1. Monitoring Studio:

- 3.6.1.1. Temperature controlled.
- 3.6.1.2. Sufficient size to allow seating for two people in addition to the Operating Technician.

3.6.2. Television Monitor:

- 3.6.2.1. Located in monitoring studio.
- 3.6.2.2. Color video picture.
- 3.6.2.3. Resolution of no less than 350 lines
- 3.6.2.4. Continuous display during survey:
 - 3.6.2.4.1. Date of Survey.
 - 3.6.2.4.2. Number designation of structure surveyed.
 - 3.6.2.4.3. Continuous forward and reverse readout of camera distance from the reference manhole.
 - 3.6.2.4.4. Cables: 600 feet long, minimum.

3.6.3. Television Camera:

- 3.6.3.1. All cameras used shall be self-powered tractor assemblies, specifically designed for use in large diameter pipe inspection work.
- 3.6.3.2. The cameras shall be color, pan-and-tilt units, operable in 100% humidity conditions. Lights shall be mounted on and turn in the direction of the camera head.
- 3.6.3.3. The camera lens shall have not less than a 65-degree viewing angle and shall have either automatic or remote focus and iris controls.
- 3.6.3.4. Camera lighting shall be sufficient for use with color inspection cameras, and for diameters larger than 48-inches, a minimum of 1,000,000 candlepower lighting in the 3200-degree Kelvin range shall be made available.
- 3.6.3.5. The complete video system (camera, lens, lighting, cables, monitors, and recorders) shall be capable of providing a quality inspection and in a format acceptable to the City and if unsatisfactory, equipment shall be replaced. No payment will be made for unsatisfactory inspections.
- 3.6.3.6. Reverse setups will only be allowed and accepted for payment if a blockage or defect prevents the CCTV inspection from continuing in the initial direction. The Contractor shall notify the Engineer of such situations for approval. Payment will be made on the length of pipe inspected.
- 3.6.3.7. The maximum flow depth for CCTV inspection work is 20% of the pipe diameter or as approved by the Public Works Department. If the flow

depth of 20% cannot be achieved, the Contractor may be required to by-pass pump the pipe.

3.6.3.8. Accuracy of the measurements cannot be stressed too strongly. Daily calibration of the measuring devices shall be performed. Pipe lengths show and reported on the CCTV inspection video and logs shall be within 3 feet (plus or minus) of the actual pipe length as measured from center of one manhole/structure to the center of next manhole/structure. CCTV inspection that does not meet these criteria shall be reperformed and re-submitted to the Public Works Department at no additional cost to the City.

3.6.3.9. The Contractor is advised that the drainage pipe and structures vary in age and condition. The Contractor shall use extreme caution during all television inspections. If the television equipment becomes lodged in the pipes during the work, the

Contractor shall be responsible for removing the equipment including excavation of the system and paying for all costs associated with the retrieval.

3.6.4. Still Photographs:

3.6.4.1. Provide digital photographs showing whatever defect is encountered that interrupts completion of inspection (i.e., collapsed pipe, deformed pipe, severe offset joints, holes, heavy debris or roots).

3.6.4.2. Provide printed label on front of photograph with structure identification number, footage and defect type.

3.6.4.3. Digital Camera: Minimum 3.2 megapixels.

3.6.5. Digital Video Inspections – Required Deliverables:

3.6.5.1. All pipe and structure inspections performed under this contract shall be submitted to the Public Works Department in electronic (digital) format

3.6.5.2. A DVD and bound, written report with schematic of the storm drain system will be submitted to the Public Works Department for review. Completed inspections must be reviewed and checked against monthly invoicing before payment can be made. At a minimum, the following information will be on the video and written report:

3.6.5.2.1. Project Name & Street Address

3.6.5.2.2. Operating Technician's Name

3.6.5.2.3. Date & time of inspection

3.6.5.2.4. MH Start #/ MH End # (each pipe segment)

3.6.5.2.5. Pipe Material

3.6.5.2.6. Pipe Size

3.6.5.2.7. Direction of video

3.6.5.2.8. Weather & flow level

3.6.5.2.9. Constant display of the street name, MH start #/ MH end #, date and distance shall appear on the screen shots.

3.6.5.2.10. All defects and anomalies recorded and in written report with distances noted.

3.7. Schedules. The Public Works Department will provide pre-set monthly schedules and task work orders for video inspections during normal business hours. GIS maps of the stormwater systems shall be provided. A Cost proposal will be provided to Public Works Department in accordance with the stated price schedule once the Contractor has reviewed the locations.

4. EXCAVATION, BURIED JUNCTIONS, HAUL-OFF AND MISCELLANEOUS:

4.1. Haul-off of Unsuitable Material. All excessive debris, silt and soil shall be hauled off and disposed of in a manner that will not have an adverse effect on the environment. The Contractor is responsible for the safe removal and disposal of all unsuitable material in accordance with all Federal, State and Local codes, regulations and statutes.

4.2. Excavation. Excavation to change, clean, or widen channels and entrance and exit ditches to pipes and culverts in order to reestablish flow will be required on jobsites designated by the Public Works Department.

Typically, ten (10) foot of excavation is required at storm drain pipe ends; however, further excavation may be required as designated by the Public Works Department.

4.3. Buried Junctions. Excavation of buried junctions will be required as designated by the Public Works Department. Junction boxes and other buried structures which are exposed may be required to be raised to grade at the Public Works Department's instruction. Pre-cast concrete and masonry structure work may be encountered and provisions to have these brought to grade are included in the bid items. The Florida Utility Location Call Center (811) shall be notified, and the excavation permit valid before excavation begins and during all phases of excavation operations.

4.3.1. Hydro-Excavation will be paid on a per-hour basis for location of utilities and an excavation permit shall be obtained.

4.4. Erosion and Siltation. Contractor shall take the necessary measures throughout the project to control erosion and to prevent silting of streams, rivers and lakes.

4.5. Landscape. Excavation sites will be re-seeded and wheat straw placed to prevent soil erosion. Replacement landscape items will be installed as directed.

4.6. Rip-Rap. Rip-Rap may be required at large pipe and culvert ends and the Public Works Department will instruct the contractor in these cases.

5. STORMWATER SYSTEM REPAIRS:

5.1. FDOT and Miami Dade County Standards. Repairs to the Stormwater System shall conform to the *Florida Department of Transportation (FDOT) Standard Specifications, 2013 Edition*. Standards will be as specified on Price Schedule or as directed by the Public Works Department.

5.2. Schedules and Cost Proposals. The Contractor shall submit sketches, schedules and cost proposals to the Public Works Department for approval before the beginning of all stormwater system repair projects.

5.3. Payment. All items on the Price Schedule shall be paid as installed costs (includes all material, labor, etc.).

5.4. Slip Lining. High Density Polyethylene Pipe (HDPE) which meets AASHTO M326 shall be used to line existing pipe. Pipe that is slip lined shall include grouting of the pipe ends per the pipe manufacture's specification for grouting ends. Snap-Tite HDPE shall be used or an approved equal by the Public Works Department.

5.5. Aluminized CMP. Aluminized Corrugated Metal Pipe (CMP) will be used where metal pipe is specified by the Public Works Department. Aluminized Steel Type 2 (ALT 2) shall meet the specifications of ASSHTO M274 and ASTM A929.

5.6. MUTCD. The *Manual for Uniform Traffic Control Devices (MUTCD), 2009 Edition* shall be used for all traffic control layouts and road closures. Plans for road closures will be submitted to the Public Works Department for prior approval and notifications two weeks in advance of closures. In emergency cases, the Public Works Department may waive this procedure.

5.7. Erosion Control. The *Manual for Erosion and Sediment Control in Florida*, will be used for all erosion and silt control. Erosion control measures will be maintained during all phases of construction.

2-2 PROPOSER QUALIFICATIONS

Adequate information and documentation must be provided in the Proposal to support or confirm satisfaction of the required qualifications below:

- A detailed description of the firm including address, telephone number License Classification with number and date of expiration, applicable License status, and banking and credit references.
- Briefly describe the educational background and professional experience in a resume format of the firm owners, supervisors and key employees.
- List similar contracts for elevator modernization and upgrades held by your firm and other similar contracts, if any formerly held. List at least one person for each such contract who may be contacted by us who is knowledgeable about your work. List telephone numbers for these individuals.
- This contract will be awarded only to responsible Contractors qualified by experience to do the work specified herein. The Bidder shall submit satisfactory evidence of experience in like work and that they are fully prepared with the necessary organization, capital, equipment and machinery to complete the work to the satisfaction of the Owner.
- Company shall have been in continuous service and incorporated in the State of Florida for a minimum of three (3) years.
- Company must have a proven history in elevator maintenance, upgrades, and modernization in public facilities.

- Company must be fully licensed with all required State and/or Local government licenses, and permits.
- Demonstrate an overall combination of skills, prior work experience, business reputation, and commitment to diversity.

2-3 TERM OF CONTRACT

The term of the contract should not exceed one fiscal year.

PART III

PROPOSAL REQUIREMENTS

3-1 RULES FOR PROPOSALS

In order to maintain comparability and enhance the review process, proposals shall be organized in the manner specified below and include all information required herein. The proposal must name all persons or entities interested in the proposal as principals. The proposal must declare that it is made without collusion with any other person or entity submitting a proposal pursuant to this RFP.

3-2 SUBMISSION OF PROPOSALS

The proposal shall be submitted on 8 ½ "x 11" paper, portrait orientation, with headings and sections numbered appropriately. Ensure that all information is written legibly or typed. The following should be submitted for a proposing firm to be considered:

3.2.1 Cover Page - Show the name of Proposer's agency/firm, address, telephone number, name of contact person, date, and the proposal number and description.

3.2.2 Tab 1 - Table of Contents

Include a clear identification of the material by section and by page number.

3.2.3 Tab 2 - Letter of Transmittal

3.2.3.1 Limit to one or two pages.

3.2.3.2 Briefly state the Proposers understanding of the work to be done and make a positive commitment to perform the work.

3.2.3.3 Give the names of the persons who will be authorized to make representations for the Proposer, their titles, addresses and telephone numbers.

3.2.3.4 Provide an official signature of a Corporate Officer certifying the contents of the Proposer's responses to the City's Request for Proposal.

3.2.4 Tab 3 - General Information

3.2.4.1 Name of Business.

3.2.4.2 Mailing Address and Phone Number.

3.2.4.3 Names and contact information of persons to be contacted for information or services if different from name of person in charge.

3.2.4.4 Normal business hours.

3.2.4.5 State if business is local, national, or international and indicate the business legal status (corporation, partnership, etc.).

3.2.4.6 Give the date business was organized and/or incorporated, and where.

3.2.4.7 Give the location of the office from which the work is to be done and the number of professional staff employees at that office.

3.2.4.8 Indicate whether the business is a parent or subsidiary in a group of firms/agencies. If it is, please state the name of the parent company.

3.2.4.9 State if the business is licensed, permitted and/or certified to do business in the State of Florida and attach copies of all such licenses issued to the business entity.

3.2.5 Tab 4 – Project Approach

Describe in detail your proposal to fulfill the requirements of the scope of services listed in section 2.2 of this RFP.

3.2.6 Tab 5 – Experience and Qualifications

3.2.6.1 Specify the number of years the Proposer has been in business.

3.2.6.2 Identify the Proposer’s qualifications to perform the services identified in this RFP as listed in section 2-2 of the Scope of Services.

Include resumes, not exceeding one page each, of all key personnel who will be assigned to the City.

3.2.7 Tab 6 – Schedule

3.2.7.1 Include a timetable that identifies the amount of time required to complete each component of the Program.

3.2.7.2 Indicate the earliest available start date for your project team.

3.2.7.3 Indicate the project completion date based on the date provided in 3.2.7.1.

3.2.8 Tab 7 – Pricing of Services

3.2.8.1 Fee basis should be an all-inclusive, base fee.

3.2.9 Tab 8 – References

3.2.9.1 List a minimum of three (3) references in Florida for which the proposer has provided elevator services. Include the name of the organization, brief description of the project, name of contact person telephone number and email address.

3.2.10 Tab 9 – Additional Forms

Proposers must compete and submit as part of its Proposal all of the following forms and/or documents

- Proposer Qualifications
- Certification regarding debarment and suspension
- Drug Free workplace certification

FAILURE TO SUBMIT ALL OF THE ABOVE REQUIRED DOCUMENTATION MAY DISQUALIFY PROPOSER.

PART IV EVALUATION OF PROPOSALS

4-1 SELECTION COMMITTEE

A Selection Committee, consisting of City personnel, will convene, review and discuss all proposals submitted.

The Selection Committee will use a point formula during the review process to score proposals and assign points in the evaluation process in accordance with the evaluation criteria. The Proposer shall satisfy and explicitly respond to all the requirements of the RFP including a detailed explanation of how the services shall be performed.

Each proposal will be reviewed to determine if the Proposal is responsive to the submission requirements outlines in the Solicitation. A responsive Proposal is one which follows the requirements of this Solicitation that includes all documents are submitted in the format outlined in this Solicitation, is of timely submission, and has the appropriate signatures as required on each document. Failure to comply with these requirements may result in the Proposal being deemed non-responsive. The Contract (s) will be awarded to the most responsive proposer whose Proposal best serves the interest of and represents the best values to the City of Opa-locka.

4-2 EVALUATION CRITERIA

The Committee may select and choose to invite any and/or or all firms to make a presentation and be interviewed by the Committee as part of the evaluation process for this Solicitation. The Committee's decision will be communicated by staff to all Respondents. The Respondent's presentation may clarify but may not modify their submitted proposal. Any discussion between the presenter (s) and Evaluation Committee during presentations are intended only for purposes of providing clarification in response to questions from the Committee.

Category	Points
Experience and Qualifications of professional personnel assigned to project 1. Number of years providing services requested 2. Qualifications and experience of staff 3. Licensing 4. Adherence to requirements, forms and qualifications listed in this RFP	25
References 1. Performance of similar services for governmental clients including at least two references	10
Resources and approach 1. Adequate resources 2. Proposed plan and approach to fulfilling scope	30
Price Proposal 1. Cost of proposed services	35
TOTAL	100

4-3 ORAL PRESENTATIONS

Proposers may be required to make individual presentations to the City Selection Committee in order to clarify their proposals. Only those firms with the highest rated scores in accordance with the stated criteria and their weights will be invited to give oral presentations. However, the City has the right to accept the best proposal as submitted, without discussion or negotiation.

If the City determines that such presentations are needed, a time and place will be scheduled for oral presentations. Each Proposer shall be prepared to discuss and substantiate any of the areas of the proposal submitted, and its qualifications to perform the specified services. During the oral presentations, the Proposers should relate their discussion to the evaluation criteria, which will include (but not be limited to) their approach to the project. The proposed Project Manager must be in attendance.

The Evaluation Criteria may be changed for the oral presentation evaluation phase. References and site visits (if completed) shall be included in the final evaluation criteria, along with other criteria and weights as determined by the Selection Committee. Finalists will be informed as to the revised criteria, if any, prior to their oral presentation.

Additionally, prior to award of an Agreement pursuant to this RFP, the City may require Proposers to submit such additional information bearing upon the Proposer's ability to perform the services in the Agreement as the City deems appropriate.

4-4 FINAL SELECTION

The City of Opa-locka will select the firm that meets the best interests of the City. The City shall be the sole judge of its own best interests, the proposals, and the resulting negotiated agreement. The City's decisions will be final. Following the notification of the selected firm, it is expected that an Agreement will be executed between both parties. City staff will recommend award to the responsible Proposer whose Proposal is determined to provide overall best value to the City, considering the evaluation factors in this RFP.

4-5 AWARD AND CONTRACT EXECUTION

After review by the Selection Committee of the proposals and oral presentations a recommendation will be made to the City Manager for submission to the City Commission for final approval. Upon Commission authorization, contract negotiations will be initiated with the first ranked firm. If those negotiations are unsuccessful, the City will formally terminate negotiations with the first ranked firm and will commence contract negotiations with the next ranked firm, etc. Upon successful contract negotiations with the prevailing firm, the remaining firms will be notified that the process has been completed and that they were not selected.



**RFP NO. 22-XXXXXXX
PROPOSER QUALIFICATIONS**

**CLEAN, INSPECT AND REPAIR THE
CITY'S MUNICIPAL STORM SEWER SYSTEM (MS4)**

The Proposer, as a result of this proposal, **MUST** hold a County and/or Municipal Contractor's Occupational License in the area of their fixed business location. The following information **MUST** be completed and submitted with the proposal to be considered:

1. Legal Name and Address:

Name: _____

Address: _____

City, State, Zip: _____ Phone/Fax: _____

2. Check One: Corporation () Partnership () Individual ()

3. If Corporation, state:

Date of Incorporation: _____ State in which Incorporated: _____

4. If an out-of-state Corporation, currently authorized to do business in Florida, give date of such authorization: _____

5. Name and Title of Principal Officers Date Elected:

6. The length of time in business: _____years

**7. The length of time (continuous) in business as a service organization in Florida:
_____years**

8. Provide a list of at least three commercial or government references that the bidder has supplied service/commodities meeting the requirements of the City of Opa-locka specification, during the last twenty-four months.

9. A copy of County and/or Municipal Occupational License(s)

Note: Information requested herein and submitted by the proposers will be analyzed by the City of Opa-locka and will be a factor considered in awarding any resulting contract. The purpose is to insure that the Contractors, in the sole opinion of the City of Opa-locka, can sufficiently and efficiently perform all the required services in a timely and satisfactory manner as will be required by the subject contract. If there are any terms and/or conditions that are in conflict, the most stringent requirement shall apply.



RFP NO: 22-XXXXXXX
PRICE PROPOSAL FORM

**CLEAN, INSPECT AND REPAIR THE
CITY'S MUNICIPAL STORM SEWER SYSTEM (MS4)**

Firms must use the Cost Proposal below to submit your Firm's cost for this project indicated in the Scope of Service herein.

The City reserves the right to increase, decrease, and/or choose the items and quantities below for the Project to meet its available budget using the hourly rates provided below.

Proposing firm must completely fill out each row below.

Your firm must provide a detailed fee schedule that explains the cost and services for each description of task.

Item No.	Description	Estimated Quantity	Unit	Unit Price	Extended Price
General Conditions					
1.	Mobilization (emergency jobsites only)	8	EA	\$ _____	\$ _____
2.	Out of Scope Work, Foreman	40	HR	\$ _____	\$ _____
3.	Out of Scope Work, Laborer	40	HR	\$ _____	\$ _____
Traffic Control					
4.	Traffic Control Major Street (emergency jobsites only)	8	EA	\$ _____	\$ _____
5.	Traffic Control Minor Street (emergency jobsites only)	8	EA	\$ _____	\$ _____
6.	Mobile Electronic Detour Signs (emergency jobsites)	6	EA	\$ _____	\$ _____
Location & Hydro-excavation					
7.	Sonar Location (includes flagging and paint)	10	LF	\$ _____	\$ _____
8.	Hydro-Excavation (Complete)	16	HR	\$ _____	\$ _____
Hydro-Jet Storm Drain Cleaning (less than 50% full)					
9.	12" Pipe - Clean less than 50% full	100	LF	\$ _____	\$ _____
10.	15" Pipe - Clean less than 50% full	100	LF	\$ _____	\$ _____
11.	18" Pipe - Clean less than 50% full	600	LF	\$ _____	\$ _____
12.	21" Pipe - Clean less than 50% full	100	LF	\$ _____	\$ _____
13.	24" Pipe - Clean less than 50% full	300	LF	\$ _____	\$ _____
14.	30" Pipe - Clean less than 50% full	300	LF	\$ _____	\$ _____

15.	36" Pipe - Clean less than 50% full	300	LF	\$ _____	\$ _____
16.	42" Pipe - Clean less than 50% full	300	LF	\$ _____	\$ _____
17.	48" Pipe - Clean less than 50% full	300	LF	\$ _____	\$ _____
18.	54" Pipe - Clean less than 50% full	300	LF	\$ _____	\$ _____
19.	60" Pipe - Clean less than 50% full	300	LF	\$ _____	\$ _____
20.	66" Pipe - Clean less than 50% full	300	LF	\$ _____	\$ _____

PRICE SCHEDULE					
Item No.	Description	Estimate d Quantity	Unit	Unit Price	Extended Price
21.	72" Pipe - Clean less than 50% full	200	LF	\$ _____	\$ _____
22.	78" Pipe -Clean less than 50% full	200	LF	\$ _____	\$ _____
23.	84" Pipe - Clean less than 50% full	200	LF	\$ _____	\$ _____
24.	90" Pipe - Clean less than 50% full	200	LF	\$ _____	\$ _____
25.	96" Pipe - Clean less than 50% full	200	LF	\$ _____	\$ _____
Hydro Jet Storm Drain Cleaning (50% full or greater)					
26.	12" Pipe - Clean 50% full or greater	100	LF	\$ _____	\$ _____
27.	15" Pipe - Clean 50% full or greater	100	LF	\$ _____	\$ _____
28.	18" Pipe - Clean 50% full or greater	800	LF	\$ _____	\$ _____
29.	21" Pipe - Clean 50% full or greater	100	LF	\$ _____	\$ _____
30.	24" Pipe - Clean 50% full or greater	200	LF	\$ _____	\$ _____
31.	30" Pipe - Clean 50% full or greater	200	LF	\$ _____	\$ _____
32.	36" Pipe - Clean 50% full or greater	200	LF	\$ _____	\$ _____
33.	42" Pipe - Clean 50% full or greater	200	LF	\$ _____	\$ _____
34.	48" Pipe -Clean 50% full or greater	200	LF	\$ _____	\$ _____

35.	54" Pipe - Clean 50% full or greater	200	LF	\$ _____	\$ _____
36.	60" Pipe - Clean 50% full or greater	200	LF	\$ _____	\$ _____
37.	66" Pipe - Clean 50% full or greater	200	LF	\$ _____	\$ _____
38.	72" Pipe - Clean 50% full or greater	200	LF	\$ _____	\$ _____
39.	78" Pipe - Clean 50% full or greater	200	LF	\$ _____	\$ _____
40.	84" Pipe - Clean 50% full or greater	200	LF	\$ _____	\$ _____
41.	90" Pipe - Clean 50% full or greater	200	LF	\$ _____	\$ _____
42.	96" Pipe - Clean 50% full or greater	200	LF	\$ _____	\$ _____
Special Storm Line Cleaning & Clearing Roots, Rocks, Debris					
43.	12" to 36" Pipe	200	LF	\$ _____	\$ _____
PRICE SCHEDULE					
Item No.	Description	Estimated Quantity	Unit	Unit Price	Extended Price
44.	42" to 96" Pipe	200	LF	\$ _____	\$ _____
Square Brick Manholes (raise to grade)					
45.	4' Sqre Brick MH w/ Ring & Cover	50	VF	\$ _____	\$ _____
46.	5' Sqre Brick MH w/ Ring & Cover	20	VF	\$ _____	\$ _____
47.	6' Sqre Brick MH w/ Ring & Cover	20	VF	\$ _____	\$ _____

Round Brick Manholes (raise to grade)					
48.	4' Rnd Brick MH w/ Ring & Cover	50	VF	\$ _____	\$ _____
49.	5' Rnd Brick MH w/ Ring & Cover	20	VF	\$ _____	\$ _____
50.	6' Rnd Brick MH w/ Ring & Cover	20	VF	\$ _____	\$ _____
Square Precast Manholes (raise to grade)					
51.	4' Sqre MH w/ Ring & Cover	30	VF	\$ _____	\$ _____
52.	5' Sqre MH w/ Ring & Cover	20	VF	\$ _____	\$ _____
53.	6' Sqre MH w/ Ring & Cover	20	VF	\$ _____	\$ _____
Round Precast Manholes (raise to grade)					
54.	4' Rnd MH w/ Ring & Cover	50	VF	\$ _____	\$ _____
55.	5' Rnd MH w/ Ring & Cover	20	VF	\$ _____	\$ _____
56.	6' Rnd MH w/ Ring & Cover	20	VF	\$ _____	\$ _____
Special Structures/Components (raise to grade)					
57.	4' Dia Pedestal Top w Grate Inlet	20	EA	\$ _____	\$ _____
58.	5' Dia Pedestal Top w Grate Inlet	20	EA	\$ _____	\$ _____
59.	6' Dia Pedestal Top w Grate Inlet	10	EA	\$ _____	\$ _____
60.	4' Dia Pedestal Top w MH R/C	20	EA	\$ _____	\$ _____
61.	5' Dia Pedestal Top w MH R/C	20	EA	\$ _____	\$ _____

62.	6' Dia Pedestal Top w MH R/C	10	EA	\$ _____	\$ _____
63.	Precast SW CB Top, w/R/C, no throat	10	EA	\$ _____	\$ _____
64.	Precast DW CB Top, w/R/C, no throat	10	EA	\$ _____	\$ _____
65.	4'x4' Precast Top w/ MH R/C	30	EA	\$ _____	\$ _____
PRICE SCHEDULE					
Item No.	Description	Estimate d Quantity	Unit	Unit Price	Extended Price
66.	5'x5' Precast Top w/ MH R/C	20	EA	\$ _____	\$ _____
67.	Cast in Place Top w/R/C	10	CY	\$ _____	\$ _____
68.	Cast in Place Throat Only	10	CY	\$ _____	\$ _____
69.	Uncover Buried JB (4')	50	EA	\$ _____	\$ _____
70.	Uncover Buried JB (4'-8')	30	EA	\$ _____	\$ _____
71.	Uncover Buried JB (4'-12')	20	EA	\$ _____	\$ _____
72.	Uncover Buried JB (>12')	10	EA	\$ _____	\$ _____
CCTV OF STORM PIPES (w/ DVD & Written Report)					
73.	12" - 15" diameters	200	LF	\$ _____	\$ _____
74.	18" - 24" diameters	200	LF	\$ _____	\$ _____
75.	30" - 42" diameters	200	LF	\$ _____	\$ _____

76.	48" - 54" diameters	200	LF	\$ _____	\$ _____
77.	60" - 66" diameters	200	LF	\$ _____	\$ _____
78.	72" - 84" diameters	200	LF	\$ _____	\$ _____
79.	90" - 96" diameters	200	LF	\$ _____	\$ _____
80.	Visual Inspections (pics per project)	200	EA	\$ _____	\$ _____
Erosion Control & Landscape Items					200
81.	Stone Rip Rap Type I in Place	200	SY	\$ _____	\$ _____
82.	Stone Rip Rap Type III In Place	200	SY	\$ _____	\$ _____
83.	Stone Rip Rap 12" Installed	4,000	SY	\$ _____	\$ _____
84.	Install & Remove Type A Silt Fence	500	LF	\$ _____	\$ _____
85.	Install & Remove Type C Silt Fence	500	LF	\$ _____	\$ _____
86.	Install & Remove Type C Silt Fence-ALT	500	LF	\$ _____	\$ _____
87.	Inlet Sediment Traps - Silt Fence Sd2	200	EA	\$ _____	\$ _____
88.	Rock Bags for curb inlet/CB sediment Protection	20	EA	\$ _____	\$ _____
89.	Install & Remove Orange Tree Save Fence	200	LF	\$ _____	\$ _____
90.	Seed & Straw (Permanent Grassing)	5,000	SY	\$ _____	\$ _____
91.	Seed & Straw (Temp Grassing)	3,000	SY	\$ _____	\$ _____
92.	Sodding Complete - Fescue	3,000	SY	\$ _____	\$ _____

93.	Sodding Complete - Bermuda	3,000	SY	\$ _____	\$ _____
94.	Sodding Complete - Zoysia	2,000	SY	\$ _____	\$ _____
95.	Sodding Complete - Centipede	3,000	SY	\$ _____	\$ _____
96.	Topsoil Complete	100	CY	\$ _____	\$ _____
97.	Pine Straw	1,000	SY	\$ _____	\$ _____
98.	Wheat Straw Mulch	1,000	SY	\$ _____	\$ _____
99.	Tree Replacement 2-1/2" Hardwood, Installed	15	EA	\$ _____	\$ _____
100.	Tree Replacement 2-1/2" Installed	200	EA	\$ _____	\$ _____
101.	Shrub & Misc. Plants Replacement: 1 gallon, installed	100	EA	\$ _____	\$ _____
102.	Shrub Replacement: 3 gallon, installed	100	EA	\$ _____	\$ _____
103.	Shrub Replacement: 5 gallon, installed	500	EA	\$ _____	\$ _____
104.	Shrub Replacement: 7 gallon, installed	200	EA	\$ _____	\$ _____
105.	Bedding Flower per flat of 18 installed	100	SY	\$ _____	\$ _____
106.	Debris Removal, Tandem Dump Truck	100	CY	\$ _____	\$ _____
Miscellaneous Items					
107.	Removal of Existing Non-Drainage Structures	10	EA	\$ _____	\$ _____
108.	Removal of Existing Drainage Structure	10	EA	\$ _____	\$ _____
109.	Removal Existing Pipe all Types and Sizes	100	LF	\$ _____	\$ _____
110.	Stone #57	100	Ton	\$ _____	\$ _____
111.	Surge Stone	200	Ton	\$ _____	\$ _____
112.	No.3's and 4' Stone	200	Ton	\$ _____	\$ _____
Bypass Pumping Operations					
113.	Bypass pump setup-equipment and hose placement	60	EA	\$ _____	\$ _____
114.	4" Pumping Operation Time	40	HR	\$ _____	\$ _____

115.	6" Pumping Operation Time	40	HR	\$ _____	\$ _____
PRICE SCHEDULE					
Item No.	Description	Estimated Quantity	Unit	Unit Price	Extended Price
116.	8" Pumping Operation Time	16	HR	\$ _____	\$ _____
117.	10" Pumping Operation Time	8	HR	\$ _____	\$ _____
118.	12" Pumping Operation Time	8	HR	\$ _____	\$ _____
Reinforced Concrete Pipe (RCP) Class 3 Installed to 10 foot depth					
119.	18 " RCP	200	LF	\$ _____	\$ _____
120.	24" RCP	200	LF	\$ _____	\$ _____
121.	30" RCP	100	LF	\$ _____	\$ _____
122.	36" RCP	100	LF	\$ _____	\$ _____
123.	42" RCP	100	LF	\$ _____	\$ _____
124.	48" RCP	100	LF	\$ _____	\$ _____
125.	54" RCP	60	LF	\$ _____	\$ _____
126.	60" RCP	60	LF	\$ _____	\$ _____
127.	72" RCP	60	LF	\$ _____	\$ _____
Corrugated Metal Pipe (CMP) Aluminized Coated Installed to 10 foot depth					
128.	15" CMP	100	LF	\$ _____	\$ _____
129.	18" CMP	200	LF	\$ _____	\$ _____
130.	24" CMP	200	LF	\$ _____	\$ _____
131.	30" CMP	200	LF	\$ _____	\$ _____

132.	36" CMP	200	LF	\$ _____	\$ _____
133.	42" CMP	100	LF	\$ _____	\$ _____
134.	48" CMP	200	LF	\$ _____	\$ _____
135.	54" CMP	100	LF	\$ _____	\$ _____
136.	60" CMP	60	LF	\$ _____	\$ _____
137.	72" CMP	60	LF	\$ _____	\$ _____
Additional Depth of Cover for Pipes Includes excavation, backfill & compaction					
138.	2 to 4 additional foot of cover	200	LF	\$ _____	\$ _____
139.	4 to 12 additional foot of cover	200	LF	\$ _____	\$ _____
Metal Flared End Sections (GADOT Std. 1120)					
140.	18" MFES 16 Gage	20	EA	\$ _____	\$ _____
141.	24" MFES 14 Gage	20	EA	\$ _____	\$ _____
142.	30" MFES 14 Gage	10	EA	\$ _____	\$ _____
143.	36" MFES 14 Gage	10	EA	\$ _____	\$ _____
PRICE SCHEDULE					
Item No.	Description	Estimated Quantity	Unit	Unit Price	Extended Price
144.	42" MFES 14 Gage	10	EA	\$ _____	\$ _____
Metal Safety End Sections (GADOT Std. Special Detail)					
145.	18" SFES 16 Gage	10	EA	\$ _____	\$ _____
146.	24" SFES 16 Gage	10	EA	\$ _____	\$ _____
147.	30" SFES 12 Gage	6	EA	\$ _____	\$ _____
148.	36" SFES 12 Gage	6	EA	\$ _____	\$ _____
149.	42" SFES 12 Gage	6	EA	\$ _____	\$ _____

150.	48" SFES 12 Gage	6	EA	\$ _____	\$ _____
Precast Concrete Flared End Sections					
151.	18" CFES	20	EA	\$ _____	\$ _____
152.	24" CFES	20	EA	\$ _____	\$ _____
153.	30" CFES	20	EA	\$ _____	\$ _____
154.	36" CFES	10	EA	\$ _____	\$ _____
155.	42" CFES	10	EA	\$ _____	\$ _____
Precast Concrete Headwalls					
156.	18" Precast HW	30	EA	\$ _____	\$ _____
157.	24" Precast HW	20	EA	\$ _____	\$ _____
158.	30" Precast HW	10	EA	\$ _____	\$ _____
159.	36" Precast HW	10	EA	\$ _____	\$ _____
160.	42" Precast HW	10	EA	\$ _____	\$ _____
161.	48" Precast HW	10	EA	\$ _____	\$ _____
162.	36" Precast HW w/ Velocity Dissipater	20	EA	\$ _____	\$ _____
163.	42" Precast HW w/ Velocity Dissipater	10	EA	\$ _____	\$ _____
164.	48" Precast HW w/ Velocity Dissipater	20	EA	\$ _____	\$ _____
Cast-in-place Concrete Headwall					
165.	Cast-in-place Concrete Headwall -	20	CY	\$ _____	\$ _____
166.	Cast-in-place Concrete Headwall - FDOT Std.	20	CY	\$ _____	\$ _____
Brick-in-Place Headwall					
167.	Brick-in-Place Headwall for 18" pipe	20	EA	\$ _____	\$ _____

168.	Brick-in-Place Headwall for 24" pipe	20	EA	\$ _____	\$ _____
169.	Brick-in-Place Headwall for 30" pipe	10	EA	\$ _____	\$ _____
170.	Brick-in-Place Headwall for 36" pipe	10	EA	\$ _____	\$ _____
171.	Brick-in-Place Headwall for 42" pipe	10	EA	\$ _____	\$ _____
Rubble Masonry Headwall					
172.	Lithonia Granite Rubble Rock HW for 48" pipe	500	SF	\$ _____	\$ _____
173.	Lithonia Granite Rubble Rock HW for 54" pipe	600	SF	\$ _____	\$ _____
174.	Lithonia Granite Rubble Rock HW for 60" pipe	650	SF	\$ _____	\$ _____
PRICE SCHEDULE					
Item No.	Description	Estimated Quantity	Unit	Unit Price	Extended Price
175.	Lithonia Granite Rubble Rock HW for 72" pipe	700	SF	\$ _____	\$ _____

Slip Lining with Snap-Tite HDPE (AASHTO M326), Include Grouting Ends (or approved equal)					
176.	12.75" OD	100	LF	\$ _____	\$ _____
177.	14" OD	200	LF	\$ _____	\$ _____
178.	18" OD	100	LF	\$ _____	\$ _____
179.	20" OD	200	LF	\$ _____	\$ _____
180.	24" OD	200	LF	\$ _____	\$ _____
181.	32" OD	100	LF	\$ _____	\$ _____
182.	36" OD	200	LF	\$ _____	\$ _____
183.	42" OD	100	LF	\$ _____	\$ _____
184.	48" OD	50	LF	\$ _____	\$ _____
185.	54" OD	50	LF	\$ _____	\$ _____
186.	63" OD	50	LF	\$ _____	\$ _____

Road Restoration					
187.	Graded Aggregate Base	18	Ton	\$ _____	\$ _____
188.	Crusher Run Stone	18	Ton	\$ _____	\$ _____
189.	Asphaltic Concrete Binder Course	20	Ton	\$ _____	\$ _____
190.	Asphaltic Concrete Surface Course	20	Ton	\$ _____	\$ _____
191.	Tack Coat	50	Gal	\$ _____	\$ _____
192.	2" Asphalt Concrete Hot Mix for Trench Cap	20	Ton	\$ _____	\$ _____
Earthwork & Grading					
193.	Tree Removal 6" - 12"	100	EA	\$ _____	\$ _____
194.	Tree Removal 13" - 23"	50	EA	\$ _____	\$ _____
195.	Tree Removal >23"	30	EA	\$ _____	\$ _____
196.	Clear & Grubbing	100	SY	\$ _____	\$ _____
197.	Channel Excavation	50	CY	\$ _____	\$ _____
198.	Additional Excavation	10	CY	\$ _____	\$ _____
199.	Haul-In Structural Fill Material	20	CY	\$ _____	\$ _____
200.	Haul-Off Soil Material	50	CY	\$ _____	\$ _____
201.	Finish Grading	80	SY	\$ _____	\$ _____
202.	Trench Rock Excavation	60	CY	\$ _____	\$ _____

203.	Debris Removal	100	CY	\$ _____	\$ _____
Miscellaneous Items					
204.	Connect to Existing Structures	10	EA	\$ _____	\$ _____
205.	Debris Removal, Tandem Dump Truck	20	LOAD	\$ _____	\$ _____
206.	Removal of Existing Non Drainage Structures	20	EA	\$ _____	\$ _____
207.	Removal of Existing Drainage Structure	20	EA	\$ _____	\$ _____
208.	Remove Existing Pipe all Types and Sizes	200	LF	\$ _____	\$ _____
209.	Saw Cut Existing Pavements	100	LF	\$ _____	\$ _____
210.	Stone #57	100	TON	\$ _____	\$ _____
211.	Surge Stone	100	TON	\$ _____	\$ _____
212.	No. 3's and 4' Stone	100	TON	\$ _____	\$ _____
213.	Roll-Off Dumpster	10	DAY	\$ _____	\$ _____
214.	Relocate Existing Residential Water Meter, Including Box	10	EA	\$ _____	\$ _____
Grand Total of All Line Items					\$ _____
NOTE TO BIDDER: All Quantities are estimated.					
LEGEND FOR PRICE SCHEDULE					
EA	Each	SW	Single wing		
HR	Hour	DW	Double wing		

LF	Linear foot	HW	Headwall
VF	Vertical foot	R/C	Ring and cover
CY	Cubic yards	JB	Junction box
SY	Square yards	CB	Catch basin
SF	Square foot	RCP	Reinforced concrete pipe
OD	Outside diameter	CMP	Corrugated metal pipe
GAL	Gallon	MFES	Metal flared end section
SQRE	Square	SFES	Safety flared end section (metal)
MH	Manhole	CFES	Concrete flared end section
RND	Round	GAB	Graded aggregate base

SUBMITTED THIS _____ DAY OF _____ 2022.

BID SUBMITTED BY:

Company

Telephone Number

Name of Person Authorized to Submit Bid

Fax Number

Signature

Email Address

Title



CITY OF OPA-LOCKA

CERTIFICATION REGARDING DEBARMENT, SUSPENSION PROPOSED DEBARMENT AND OTHER MATTERS OF RESPONSIBILITY

1. The Proposer certifies, to the best of its knowledge and belief, that the Proposer and/or any of its Principals:

A. Are not presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency.

B. Have not, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property; and

C. Are not presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph 1-B of this provision.

2. The Proposer has not, within a three-year period preceding this offer, had one or more contracts terminated for default by any City, State or Federal agency.

A. "Principals," for the purposes of this certification, means officers; directors; owners; partners; and, persons having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions). This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution Under Section 1001, Title 18, United States Code.

B. The Proposer shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Proposer learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

C. A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the Proposer's responsibility. Failure of the Proposer to furnish a certification or provide such additional information as requested by the Contracting Officer may render the Proposer non-responsive.

D. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of a Proposer is not required to exceed

that which is normally possessed by a prudent person in the ordinary course of business dealings.

E. The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Proposer knowingly rendered an erroneous certification, in addition to other remedies available to the Government, the Contracting Officer may terminate the contract resulting from this solicitation for default.

AS THE PERSON AUTHORIZED TO SIGN THE STATEMENT, I CERTIFY THAT THIS FIRM COMPLIES FULLY WITH THE ABOVE REQUIREMENTS.

Signature _____

Printed Name _____



**CITY OF OPA-LOCKA
RFP NO. 22-XXXXXXX**

DRUG-FREE WORKPLACE CERTIFICATION FORM

Whenever two (2) or more bids/proposals, which are equal with respect to price, quality, and service, are received by the CITY OF OPA-LOCKA for the procurement of commodities or contractual services, a bid/proposal received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of controlled substances is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in number (1).
4. In the statement specified in number (1), notify the employees that as a condition for working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction on or plea of guilty or no contest to any violation of Chapter 893, Florida Statutes or of any controlled substance law of the United States or any singular state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of Section 287.087, Florida Statutes.

This Certification is submitted by _____ the
(Name)

_____ of _____
(Title/Position) (Company)

who does hereby certify that said Company has implemented a drug-free workplace program, which meets the requirements of Section 287.087, Florida Statutes, which are identified in numbers (1) through (6) above.

Date

Signature



**CITY OF OPA-LOCKA
NON-COLLUSION AFFIDAVIT**

STATE OF FLORIDA - COUNTY OF MIAMI DADE

_____ being first duly sworn, deposes and says that:

- (1) He/She/They is/are the _____
(Owner, Partner, Officer, Representative or Agent) of
_____ the PROPONENT that has submitted the attached proposal;
- (2) He/She/They is/are fully informed respecting the preparation and contents of the attached Proposal and of all pertinent circumstances respecting such Proposal;
- (3) Such Proposal is genuine and is not a collusive or sham Proposal;
- (4) Neither the said PROPONENT nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, have in any way colluded, conspired, connived or agreed, directly or indirectly, with any other PROPONENT, firm, or person to submit a collusive or sham Proposal in connection with the Work for which the attached Proposal has been submitted; or to refrain from Proposing in connection with such Work; or have in any manner, directly or indirectly, sought by agreement or collusion, or communication, or conference with any PROPONENT, firm, or person to fix any overhead, profit, or cost elements of the Proposal or of any other PROPONENT, or to fix any overhead, profit, or cost elements of the Proposed Price or the Proposed Price of any other PROPONENT, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the proposed Work;
- (5) The price or prices quoted in the attached Proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the PROPONENT or any other of its agents, representatives, owners, employees or parties of interest, including this affiant.

Signed, sealed and delivered in the presence of:

Witness

By: _____
Signature

Witness

Print Name and Title



NON-DISCRIMINATION AFFIDAVIT

I, the undersigned, hereby duly sworn, depose and say that the organization, business or entity represented herein shall not discriminate against any person in its operations, activities or delivery of services under any agreement it enters into with the City of Opa-locka. The same shall affirmatively comply with all applicable provisions of federal, state and local equal employment laws and shall not engage in or commit any discriminatory practice against any person based on race, age, religion, color, gender, sexual orientation, national origin, marital status, physical or mental disability, political affiliation or any other factor which cannot be lawfully used as a basis for service delivery.

By: _____

Title: _____

Sworn and subscribed before this

____ day of _____, 20____

Notary Public, State of Florida

(Printed Name)

My commission expires: _____



E-VERIFY

Effective January 1, 2021, public and private employers, contractors and subcontractors will be required to register with, and use of the E-verify system in order to verify the work authorization status of all newly hired employees. Vendor/Consultant/Contractor acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of:

- a) All persons employed by Vendor/Consultant/Contractor to perform employment duties within Florida during the term of the contract; and
- b) All persons (including sub-vendors/sub-contractors) assigned by Vendor /Consultant/ Contractor to perform work pursuant to the contract with the Department. The Vendor /Consultant/ Contractor acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the contract is a condition of the contract with the City; and

By entering into a Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes but is not limited to utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The contractor shall maintain a copy of such affidavit for the duration of the contract. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. If t contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination. The Contractor acknowledges it is liable to the City for any additional costs as a result of termination of the contract due to Contractor's failure to comply with the provisions herein.



E-VERIFY FORM

Definitions:

“Contractor” means a person or entity that has entered or is attempting to enter into a contract with a public employer to provide labor, supplies, or services to such employer in exchange for salary, wages, or other remuneration.

“Subcontractor” means a person or entity that provides labor, supplies, or services to or for a contractor or another subcontractor in exchange for salary, wages, or other remuneration.

Effective January 1, 2021, public and private employers, contractors and subcontractors will begin required registration with, and use of the E-verify system in order to verify the work authorization status of all newly hired employees. Vendor/Consultant/Contractor acknowledges and agrees to utilize the U.S. Department of Homeland Security’s E-Verify System to verify the employment eligibility of:

- a) All persons employed by Vendor/Consultant/Contractor to perform employment duties within Florida during the term of the contract; and
- b) All persons (including sub-vendors/subcompanies/subcontractors) assigned by Vendor/Consultant/Contractor to perform work pursuant to the contract with the Department. The Vendor/Consultant/Contractor acknowledges and agrees that use of the U.S. Department of Homeland Security’s E-Verify System during the term of the contract is a condition of the contract with the City of Opa-locka; and

Should vendor become successful Contractor awarded for the above-named project, by entering into this Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes but is not limited to utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The contractor shall maintain a copy of such affidavit for the duration of the contract. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. If this contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination.

Company Name:

Authorized

Signature: _____

Print Name:

Title:

Date:

RESOLUTION NO. 22-

A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA, ACCEPTING THE PROPOSAL OF SAPOZNIK INSURANCE & ASSOCIATES, LLC FOR AGENT OF RECORD INSURANCE SERVICES FOR THE CITY'S EMPLOYEE BENEFIT PROGRAMS PURSUANT TO RFQ NO. 21-0629100; AUTHORIZING THE CITY MANAGER TO ENTER INTO AN AGREEMENT ATTACHED HERETO AS EXHIBIT "A"; PROVIDING FOR ADOPTION OF REPRESENTATIONS; PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, on May 30, 2021, the City of Opa-Locka ("City") published Request for Proposals (RFP) 21-0629100 for Agent of Record Services for Employee Benefit Programs; and

WHEREAS, four (4) sealed proposals were received by the City Clerk's Office and certified by the City Clerk on July 7, 2021; and

WHEREAS, the Evaluation Committee reviewed the proposals and subsequently selected Sapoznik Insurance & Associates, LLC ("Sapoznik") as the most responsive responsible bidder; and

WHEREAS, the City Commission finds that acceptance of Sapoznik Insurance & Associates, LLC's proposal for Agent of Record Services for Employee Benefit Programs and entering into an agreement with said company is in the best interest of the City of Opa-Locka and its residents.

NOW, THEREFORE, BE IT DULY RESOLVED BY THE CITY COMMISSION OF THE CITY OF OPA- LOCKA, FLORIDA:

SECTION 1. The recitals to the preamble herein are incorporated by reference.

SECTION 2. The City Commission of the City of Opa-Locka, Florida hereby accepts the proposal of Sapoznik Insurance & Associates, LLC relating to Request for Proposals (RFP) 21-0629100, to provide Agent of Record Services for Employee Benefit Programs, and authorizes the City Manager to enter into an agreement, attached hereto as Exhibit "A".

SECTION 3. Sections of this Resolution may be renumbered or re-lettered and corrections of typographical errors which do not affect the intent may be authorized by the City Manager, or the City Manager's designee, without need of public hearing, by filing a corrected copy of the same with the City Clerk.

SECTION 3. This Resolution shall take effect upon adoption and is subject to the approval of the Governor or Governor's Designee.

PASSED and **ADOPTED** this _____ day of _____, 2022.

Veronica J. Williams, Mayor

ATTEST:

Joanna Flores, City Clerk

**APPROVED AS TO FORM AND
LEGAL SUFFICIENCY:**

Burnadette Norris-Weeks, P.A.
City Attorney

Moved by: _____

Seconded by: _____

VOTE:

Commissioner Bass	_____ (Yes)	_____ (No)
Commissioner Davis	_____ (Yes)	_____ (No)
Commissioner Dominguez	_____ (Yes)	_____ (No)
Vice-Mayor Taylor	_____ (Yes)	_____ (No)
Mayor Williams	_____ (Yes)	_____ (No)



City of Opa-locka Agenda Cover Memo

Department Director:			Department Director Signature:		
City Manager:	Darvin Williams		CM Signature:		
Commission Meeting Date:	05.11.2022	Item Type: (Enter X in box)	Resolution X	Ordinance	Other
Fiscal Impact: (Enter X in box)	Yes	No	Ordinance Reading: (Enter X in box)	1st Reading	2nd Reading
	X		Public Hearing: (Enter X in box)	Yes	No
				X	X
Funding Source: Account# :	(Enter Fund & Dept) Ex: See Financial Impact Section		Advertising Requirement: (Enter X in box)	Yes	No
					X
Contract/P.O. Required: (Enter X in box)	Yes	No	RFP/RFQ/Bid#:		
	X				
Strategic Plan Related (Enter X in box)	Yes	No	Strategic Plan Priority Area: Enhance Organizational ☐ Bus. & Economic Dev ☐ Public Safety ☐ Quality of Education ☐ Qual. of Life & City Image ☒ Communication ☐	Strategic Plan Obj./Strategy: (list the specific objective/strategy this item will address)	
	X				
Sponsor Name	City Manager		Department:	City Manager	

Short Title:

A resolution authorizing the City Manager to accept the proposal of Sapoznik Insurance, A World Company for the Agent of Record for Employee Benefit Programs pursuant to RFP No. 21-0629100 and further authorizing the City Manager to enter into an agreement with Sapoznik Insurance, A World Company.

Staff Summary:

Request for Proposal (RFP) 21-0629100 was published on May 30, 2021 for Agent of Record for Employee Benefits. Four (4) proposals were received and certified by the City Clerk on July 7, 2021.

The Evaluation Committee reviewed the proposals and subsequently selected Sapoznik Insurance, A World Company as the most responsive responsible bidder.

The proposals are listed in order from highest to lowest ranking based on Evaluation Committee scoring.

(1st)

Sapoznik Insurance was ranked first. The company displayed examples of cost savings beneficial to the employees. They were able to provide a list of local municipal clients for which they provide Agent of Record Services. Sapoznik Insurance and World Insurance merged, which resulted in the company being able to serve customers from 150 offices in the United States. The company is devoted to continuing its stellar service to the City. It is headquartered in North Miami Beach, FL and is committed to responding expeditiously to the City needs.

(2nd)

NFP was ranked second. The company did not provide examples of cost savings; however, they committed to provide excellent service to the City. They were able to provide a list of municipal clients, however they were not local. The company currently serves over 200 public entities across the Southeast area and aims to provide successful results. Although the company offices are located in Palm Beach Gardens, FL and Statesboro, Georgia, they are willing to commute to the City as needed.

(3rd)

National Marketing Group Services, Inc. was ranked third. The company displayed examples of cost savings beneficial to the employees. They were able to provide a list of local municipal clients for which they are providing Agent of Record Services. National Marketing Group Services has over 30 years of consistent service and their core values are to achieve positive outcomes. They are in Doral, Florida and are committed to responding to the City's needs in an expeditious manner.

(4th)

VistaNational Insurance Group, Inc. was ranked fourth. The company did not provide examples of cost savings; however, they committed to exceed the City's expectations as a broker. They were able to provide a list of clients; however, no references were provided for local municipal clients. The company committed to deliver exceptional service to the City and its employees. Although the company office is located in Oak Brook, IL, they are willing to commute to the City as needed.

Financial Impact

Agent of Record cost is based on an uplift charged on the cost of the various insurance programs obtained by the Agent of Record. Sapoznik Insurance was rated as 4.15 by the Evaluation Committee with the other firms receiving scores between 2.70 and 3.90.

Proposed Action:

Staff recommends the City Commission approve the recommendation for Sapoznik Insurance, A World Company based on the Selection Committee review, scoring and ranking, and authorize the City Manager to enter into an agreement with said company.

Attachment:

RFP No. 21-0629100
Advertisements
Bid Certification
Committee Evaluation Forms
Bid Proposals



**Office of the City Manager
780 Fisherman Street, 4th Floor
Opa-locka, FL 33054**

Darvin Williams, JD, MBA, MPH
Interim City Manager

Telephone (305) 953-2821
Email: dwilliams@opalockafl.gov

To: Mayor Veronica Williams
Vice Mayor John H. Taylor, Jr.
Commissioner Sherelean Bass
Commissioner Chris Davis
Commissioner Audrey Dominguez

From: Darvin Williams, Interim City Manager

Date: April 25, 2022

Re: Resolution: Committee Selection for Agent of Record for Employee Benefit Programs

Request: A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA, ACCEPTING THE PROPOSAL OF SAPOZNIK INSURANCE, A WORLD COMPANY PURSUANT TO RFP NO. 21-0629100; FURTHER AUTHORIZING THE CITY MANAGER TO ENTER INTO AN AGREEMENT WITH THE LOWEST RESPONSIVE RESPONSIBLE BIDDER; PROVIDING FOR INCORPORATION OF RECITALS; PROVIDING FOR AN EFFECTIVE DATE.

Description: Agent of Record for Employee Benefit Programs.

Analysis: Bid proposals were received by the Office of the City Clerk on July 7, 2021 at 1:12 p.m. The City Clerk's Office opened sealed proposals and certified the bids under the provisions of Sec. 2-320.1 of the City's Code of Ordinance. The following four (4) companies submitted proposals:

National Marketing Group Services, Inc.
VistaNational Insurance Group, Inc.
NFP
Sapoznik Insurance

The evaluation committee met on April 14, 2022 to review proposals. Members of the evaluation committee included:

Yslande Agenor, HR Specialist II - City of Opa-locka
Airia Austin, Public Works/CIP Director - City of Opa-locka
Sandra Bridgeman, Acting Assistant Finance Director - Consultant TriMerge CPA
Geraldine Lazarre, Acting Finance Director - Consultant TriMerge CPA
Nelson Rodriguez, Information Technology Director - City of Opa-locka

Each committee member's review evaluation and scoring of proposals were based on the following criterion and weight system:

Criterion	Weight
Experience and Qualifications	25%
Quality of Service	25%
Cost Saving Initiatives	25%
Proposed Fee	25%

Below you will find the selection committee evaluations that include scoring of the four (4) proposals submitted / received. The proposals are listed in order from highest to lowest in ranking:

Sapoznik Insurance, A World Company

(1st)

Name	Rating
Yslande Agenor	4.25
Airia Austin	4.25
Sandra Bridgeman	3.75
Geraldine Lazzare	3.75
Nelson Rodriguez	4.75
TOTAL	4.15

Based on the Evaluation Committee scoring, Sapoznik Insurance company was rated the first ranked proposer. The company displayed examples of cost savings that would be beneficial to the employees. They were able to provide a list of local municipal clients for which they are providing Agent of Record Services. Saponik Insurance and World Insurance merged as one company which resulted in the company being able to serve its customers from 150 offices with 1,300 employees across the United States. The company devoted to continuing their stellar service to the City of Opa-locka. They are in North Miami Beach, Florida and is committed to responding to the City's needs in an expeditious manner.

NFP

(2nd)

Name	Rating
Yslande Agenor	4.00
Airia Austin	4.50
Sandra Bridgeman	3.50
Geraldine Lazzare	3.75
Nelson Rodriguez	3.75
TOTAL	3.90

Based on the Evaluation Committee scoring, NFP company was rated the second ranked proposer. The company did not provide examples of cost savings, however they committed to provide excellence in service to the City of Opa-locka. They were able to provide a list of municipal clients, however they were not local. The company currently serves over 200 public entities across the Southeast area and aim to provide successful results. Although the company offices are located in Palm Beach Gardens, FL and Statesboro, Georgia, they are willing to commute to the City as needed.

National Marketing Group Services, Inc.

(3rd)

Name	Rating
Yslande Agenor	3.75
Airia Austin	3.50
Sandra Bridgeman	3.50
Geraldine Lazzare	2.75
Nelson Rodriguez	4.00
TOTAL	3.50

Based on the Evaluation Committee scoring, National Marketing Group Services, Inc. was rated the third ranked proposer. The company displayed examples of cost savings that would be beneficial to the employees. They were able to provide a list of local municipal clients for which they are providing Agent of Record Services. National Marketing Group Services has over 30 years of consistent service and their core values are to achieve positive outcomes. They are in Doral, Florida and is committed to responding to the City's needs in an expeditious manner.

VistaNational Insurance Group, Inc.

(4th)

Name	Rating
Yslande Agenor	2.75
Airia Austin	4.00
Sandra Bridgeman	3.00
Geraldine Lazzare	2.25
Nelson Rodriguez	1.50
TOTAL	2.70

Based on the Evaluation Committee scoring, VistaNational Insurance Group, Inc. was rated the fourth ranked proposer. The company did not provide examples of cost savings, however they committed to exceed the City's expectations as a broker. They were able to provide a list of clients, however no references were provided for local municipal clients for which they are providing Agent of Record Services. The company committed to deliver exceptional service to the City of Opa-locka and its employees. Although the company office is located in Oak Brook, IL, they are willing to commute to the City as needed.

Recommendation(s):

Staff recommends approval based upon the committee's review, evaluation, scoring and ranking of the proposals submitted. Therefore, it is the recommendation of the Selection Committee that the City negotiates and enters into an agreement with Sapoznik Insurance.

Attachments:

Request for Proposal (RFP) #21-0629100

Advertisements

Bid Certification

Committee Evaluation Forms

Bid Proposals

*** END OF MEMORANDUM***

EVALUATION MATRIX

RFP No. 21-0629100 Agent of Record for Employee Benefit Programs

Firm Name: National Marketing Group Services, Inc.

Evaluation

		Reviewer Name:		Yslande Agenor		Airia Austin		Sandra Bridgeman		Gerri Lazarre		Nelson Rodriguez	
Criterion	Weight	Rating	Score	Rating	Score	Rating	Score	Rating	Score	Rating	Score	Rating	Score
Experience and Qualifications	25%	5	1.25	4	1.00	3	0.75	3	0.75	5	1.25	5	1.25
Quality of Services	25%	4	1.00	4	1.00	4	1.00	3	0.75	4	1.00	4	1.00
Cost Saving Initiatives	25%	3	0.75	3	0.75	4	1.00	3	0.75	4	1.00	4	1.00
Proposed Fee	25%	3	0.75	3	0.75	3	0.75	2	0.50	3	0.75	3	0.75
Total	100%		3.75		3.50		3.50		2.75		4.00		4.00

Firm Name: VistaNational Insurance Group, Inc.

Evaluation

		Reviewer Name:		Yslande Agenor		Airia Austin		Sandra Bridgeman		Gerri Lazarre		Nelson Rodriguez	
Criterion	Weight	Rating	Score	Rating	Score	Rating	Score	Rating	Score	Rating	Score	Rating	Score
Experience and Qualifications	25%	4	1.00	5	1.25	3	0.75	4	1.00	1	0.25	1	0.25
Quality of Services	25%	3	0.75	4	1.00	4	1.00	3	0.75	1	0.25	1	0.25
Cost Saving Initiatives	25%	2	0.50	3	0.75	2	0.50	0	0.00	2	0.50	2	0.50
Proposed Fee	25%	2	0.50	4	1.00	3	0.75	2	0.50	2	0.50	2	0.50
Total	100%		2.75		4.00		3.00		2.25		1.50		1.50

EVALUATION MATRIX

RFP No. 21-0629100 Agent of Record for Employee Benefit Programs

Firm Name: NFP

Evaluation

		Reviewer Name:		Yslande Agenor		Airia Austin		Sandra Bridgeman		Gerri Lazarre		Nelson Rodriguez	
Criterion	Weight	Rating	Score	Rating	Score	Rating	Score	Rating	Score	Rating	Score	Rating	Score
Experience and Qualifications	25%	5	1.25	5	1.25	3	0.75	5	1.25	4	1.00	4	1.00
Quality of Services	25%	4	1.00	4	1.00	5	1.25	3	0.75	4	1.00	4	1.00
Cost Saving Initiatives	25%	4	1.00	4	1.00	3	0.75	3	0.75	4	1.00	4	1.00
Proposed Fee	25%	3	0.75	5	1.25	3	0.75	4	1.00	3	0.75	3	0.75
Total	100%		4.00		4.50		3.50		3.75		3.75		3.75

Firm Name: Sapoznik Insurance

Evaluation

		Reviewer Name:		Yslande Agenor		Airia Austin		Sandra Bridgeman		Gerri Lazarre		Nelson Rodriguez	
Criterion	Weight	Rating	Score	Rating	Score	Rating	Score	Rating	Score	Rating	Score	Rating	Score
Experience and Qualifications	25%	5	1.25	4	1.00	4	1.00	4	1.00	4	1.00	5	1.25
Quality of Services	25%	4	1.00	4	1.00	4	1.00	4	1.00	3	0.75	5	1.25
Cost Saving Initiatives	25%	4	1.00	5	1.25	4	1.00	4	1.00	4	1.00	4	1.00
Proposed Fee	25%	4	1.00	4	1.00	3	0.75	4	1.00	5	1.25	5	1.25
Total	100%		4.25		4.25		3.75		3.75		4.75		4.75

FIRM SELECTED

Reviewer:

	National Marketing Group Services, Inc.	VistaNational Insurance Group, Inc.	NFP	Sapoznik Insurance
Yslande Agenor	3.75	2.75	4.00	4.25
Airia Austin	3.50	4.00	4.50	4.25
Sandra Bridgeman	3.50	3.00	3.50	3.75
Gerri Lazarre	2.75	2.25	3.75	3.75
Nelson Rodriguez	4.00	1.50	3.75	4.75
AVERAGE RATING	3.50	2.70	3.90	4.15

EVALUATION FORM

RFP No. 21-0629100
Agent of Record for Employee Benefit Programs

By signing this form as an Evaluator, I certify that I have no conflict of interest.

Reviewer Name:

Ysabelle Agenor

Date:

4/14/2022

Signature:

[Signature]

Firm Name:

National Marketing Group Services, Inc.

Evaluation

Notes:

Criterion	Rating
Experience and Qualifications	5
Quality of Services	4
Cost Saving Initiatives	3
Proposed Fee	3

- 4% for each plan

Firm Name:

VistaNational Insurance Group, Inc.

Evaluation

Notes:

Criterion	Rating
Experience and Qualifications	4
Quality of Services	3
Cost Saving Initiatives	2
Proposed Fee	2

Firm Name:

NFP

Evaluation

Notes:

Criterion	Rating
Experience and Qualifications	5
Quality of Services	4
Cost Saving Initiatives	4
Proposed Fee	3

Firm Name:

Sapoznik Insurance

Evaluation

Notes:

Criterion	Rating
Experience and Qualifications	5
Quality of Services	4
Cost Saving Initiatives	4
Proposed Fee	4

EVALUATION FORM

RFP No. 21-0629100
Agent of Record for Employee Benefit Programs

By signing this form as an Evaluator, I certify that I have no conflict of interest.

Reviewer Name:

AZRIA AUSTIN

Date:

4-14-2022

Signature:

[Signature]

Firm Name:

National Marketing Group Services, Inc.

Evaluation

Notes:

Criterion	Rating
Experience and Qualifications	4
Quality of Services	4
Cost Saving Initiatives	3
Proposed Fee	3

PROPOSED FEE IS NOT CLEAR.

Firm Name:

VistaNational Insurance Group, Inc.

Evaluation

Notes:

Criterion	Rating
Experience and Qualifications	5
Quality of Services	4
Cost Saving Initiatives	3
Proposed Fee	4

Firm Name:

NFP

Evaluation

Notes:

Criterion	Rating
Experience and Qualifications	5
Quality of Services	4
Cost Saving Initiatives	4
Proposed Fee	5

Firm Name:

Sapoznik Insurance

Evaluation

Notes:

Criterion	Rating
Experience and Qualifications	4
Quality of Services	4
Cost Saving Initiatives	5
Proposed Fee	4

EVALUATION FORM

RFP No. 21-0629100

Agent of Record for Employee Benefit Programs

By signing this form as an Evaluator, I certify that I have no conflict of interest.

Reviewer Name:

Sandra Bridgeman

Date:

04/14/22

Signature:

[Signature]

Firm Name:

National Marketing Group Services, Inc.

Evaluation

Notes:

Criterion	Rating
Experience and Qualifications	3.0
Quality of Services	4.0
Cost Saving Initiatives	4.0
Proposed Fee	3.0 <i>three.</i>

*Comparable work provided; financial capability not provided
Pretty solid
Good examples provided
weak on explanation of 4% provided, could not defend or explain*

Firm Name:

VistaNational Insurance Group, Inc.

Evaluation

Notes:

Criterion	Rating
Experience and Qualifications	3.0
Quality of Services	4.0
Cost Saving Initiatives	2.0
Proposed Fee	3.0

*No municipality work, financial capability not provided
Approach seems very adequate
Cost savings examples - not provided
Lump fee provided only; % per category of SVCS was mentioned verbally when asked, they were vague*

Firm Name:

NFP

Evaluation

Notes:

Criterion	Rating
Experience and Qualifications	3.0
Quality of Services	5.0
Cost Saving Initiatives	3.0
Proposed Fee	3.0

*Good/organized delivery No financial capability provided
Solid Approach
Provided Case Study instead of actual cost savings and detailed - using % per each category*

Firm Name:

Sapoznik Insurance

Evaluation

Notes:

Criterion	Rating
Experience and Qualifications	4.0
Quality of Services	4.0
Cost Saving Initiatives	4.0
Proposed Fee	3.0

*Good Exp - Mergers/Purchase issues to be worked out provided Review
Comparable work - ✓
Provided cost savings examples
detailed - using % per each category.*

EVALUATION FORM

RFP No. 21-0629100

Agent of Record for Employee Benefit Programs

By signing this form as an Evaluator, I certify that I have no conflict of interest.

Reviewer Name:

Gerri Lazarre

Date:

4/14/22

Signature:



Firm Name:

National Marketing Group Services, Inc.

Evaluation

Criterion	Rating
Experience and Qualifications	3
Quality of Services	3
Cost Saving Initiatives	3
Proposed Fee	2

Notes:

No financial data provided
 Good experience, appears to be family owned
 Some payroll
 40% overall, but could not defend

Firm Name:

VistaNational Insurance Group, Inc.

Evaluation

Criterion	Rating
Experience and Qualifications	4
Quality of Services	3
Cost Saving Initiatives	3
Proposed Fee	2

Notes:

No financial data provided
 Not medium to large in IL
 NOT provided
 \$60K, did not provide basis for fee

Firm Name:

NFP

Evaluation

Criterion	Rating
Experience and Qualifications	5
Quality of Services	3
Cost Saving Initiatives	3
Proposed Fee	4

Notes:

No financial data provided
 Large org
 appeared reasonable

Firm Name:

Sapoznik Insurance

Evaluation

Criterion	Rating
Experience and Qualifications	4
Quality of Services	3
Cost Saving Initiatives	4
Proposed Fee	4

Notes:

Provided revenue, #'s & payments only.
 merged, large organization
 seemed
 appeared reasonable

0-5

EVALUATION FORM

RFP No. 21-0629100
Agent of Record for Employee Benefit Programs

By signing this form as an Evaluator, I certify that I have no conflict of interest.

Reviewer Name:

Nelson Rodriguez

Date:

4/14/22

Signature:

[Signature]

Firm Name:

National Marketing Group Services, Inc.

Evaluation

Criterion	Rating
Experience and Qualifications	<u>5</u>
Quality of Services	<u>4</u>
Cost Saving Initiatives	<u>4</u>
Proposed Fee	<u>3</u>

Notes:

local govt. experience 10+ years
wellness budget, clear reduction in premiums
noted. Fee provided as a percentage

Firm Name:

VistaNational Insurance Group, Inc.

Evaluation

Criterion	Rating
Experience and Qualifications	<u>1</u>
Quality of Services	<u>1</u>
Cost Saving Initiatives	<u>2</u>
Proposed Fee	<u>2</u>

Notes:

No local govt. (FI) experience listed.

Firm Name:

NFP

Evaluation

Criterion	Rating
Experience and Qualifications	<u>4</u>
Quality of Services	<u>4</u>
Cost Saving Initiatives	<u>4</u>
Proposed Fee	<u>3</u>

Notes:

clear proposal w/ details spelled out. Dedicated
public sector team. local govt (FI) experience
provided.

Firm Name:

Sapoznik Insurance

Evaluation

Criterion	Rating
Experience and Qualifications	<u>5</u>
Quality of Services	<u>5</u>
Cost Saving Initiatives	<u>4</u>
Proposed Fee	<u>5</u>

Notes:

local govt experience, detailed savings for the future
Wellness plan provided.



**CITY OF OPA-LOCKA
CERTIFICATION**

**REQUEST FOR PROPOSALS
RFP NO. 21-0629100**

AGENT OF RECORD FOR EMPLOYEE BENEFIT PROGRAMS

I, Joanna Flores, City Clerk of the City of Opa-locka, Florida, do hereby certify that sealed proposal(s) were received and opened at the Opa-locka Municipal Complex, Office of the City Clerk, 780 Fisherman Street, 4th Floor, Opa-locka, Florida, at 1:12 p.m. this 7th day of July, 2021.

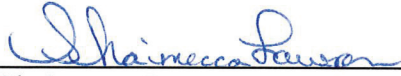
PROPOSAL(S) RECEIVED

NAME/ADDRESS

1. **National Marketing Group Services, Inc.**
7705 NW 48th Street, Suite 100
Doral, FL 33166
Contact: Michelle Gonzalez-Febres, Vice President
Tele: (786) 262-6356
Contact: Roger Gonzalez III, Operations Manager
Tele: (305) 205-4482
Website: www.mynmgs.com
2. **VistaNational Insurance Group, Inc.**
1301 W 22nd Street
Oak Brook, IL 60523
Contact: Kahlil Hogan, Principal
Tele: (630) 468-6507
Email: hogank@vistanational.com
3. **NFP**
3300 PGA Boulevard, Suite 50
Palm Beach Gardens, FL 33410
Contact: Peter Troup, Vice President, Corporate Benefits
Tele: (561) 350-1329
Email: peter.troup@nfp.com
4. **Sapoznik Insurance**
1100 NE 163rd Street
North Miami Beach, FL 33162
Contact: Rachel Sapoznik, President
Tele: (877) 948-8887
Email: rachels@sapoznik.com
Website: www.sapoznik.com

Bid Certification
RFP No. 21-0629100
Agent of Record for Employee Benefit Programs

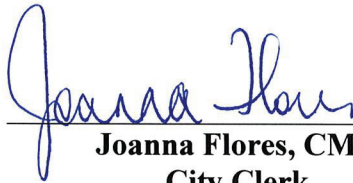
I further certify that sealed proposal(s) were submitted and properly opened in the presence of the following:



Sha'mecca Lawson
Executive Assistant to the City Manager
City of Opa-locka



Kierra Ward
Director of Human Resources
City of Opa-locka



Joanna Flores, CMC
City Clerk

City of Opa-locka



RFP NO: 21-0629100

REQUEST FOR PROPOSAL (RFP)

AGENT OF RECORD

FOR

EMPLOYEE BENEFIT PROGRAMS



CITY OF OPA-LOCKA
AGENT OF RECORD
FOR EMPLOYEE BENEFIT PROGRAMS

RFP NO. 21-0629100

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CITY OF OPA-LOCKA

REQUEST FOR PROPOSALS

RFP NO: 21-0629100

Agent of Record for Employee Benefit Programs

Sealed Proposals for Agent of Record for Employee Benefit Programs will be received by the City of Opa-locka at the Office of the City Clerk, 780 Fisherman St, 4th Floor, Opa-locka, Florida 33054, **Tuesday, June 29, 2021 by 1:00 p.m.** Any RFP Package received after the designated closing time will be returned unopened. The City of Opa-locka will be accepting proposals by mail, however it is your responsibility to submit your proposal by the due date. In addition, proposals may be submitted via www.demandstar.com (e-bid). The address to submit sealed proposals is listed below:

CITY OF OPA-LOCKA
Office of the City Clerk
780 Fisherman Street, 4th Floor
Opa-locka, Florida 33054

An original and six (6) copies for a total of seven (7) plus 1 copy of the Proposal package on USB Flash Drive in PDF format shall be submitted in sealed envelopes/packages addressed to the City Clerk, City of Opa-locka, Florida, and marked **RFP for Agent of Record for Employee Benefit Programs**.

Proposers desiring information for use in preparing proposals may obtain a set of such documents by visiting the City's website at www.opalockafl.gov or www.demandstar.com.

The City reserves the right to accept or reject any and all proposals and to waive any technicalities or irregularities therein. The City further reserves the right to award the contract to that proposer whose proposal best complies with the **RFP NO: 21-0629100** requirements. Proposers may not withdraw their proposal for a period of ninety (90) days from the date set for the opening thereof.

A Mandatory pre-bid meeting will be held on **Tuesday, June 8, 2021 at 10:00 a.m.** at Sherbondy Village, 215 Perviz Avenue, Opa-locka, FL 33054.

City Clerk
Joanna Flores, CMC



CITY OF OPA-LOCKA

RFP NO. 21-0629100

AGENT OF RECORD FOR EMPLOYEE BENEFIT PROGRAMS

PART I

PROPOSAL GUIDELINES

1-1. Introduction: The City of Opa-locka is requesting proposals from qualified professional consultants to provide Agent of Record for Employee Benefit services for the City of Opa-locka.

1-2. Proposal Submission and Withdrawal: The City of Opa-locka will be accepting proposals by mail, however it is your responsibility to submit your proposal by the due date. In addition, proposals may be submitted via www.demandstar.com (e-bid). The City must receive all proposals by 1:00pm on Tuesday, June 29, 2021. The address to submit sealed proposals is listed below:

CITY OF OPA-LOCKA
Office of the City Clerk
780 Fisherman Street, 4th Floor
Opa-locka, Florida 33054

To facilitate processing, please clearly mark the outside of the proposal package as follows: **RFP NO. 21-0629100 – Agent of Record for Employee Benefit Program**. This package shall also include the Proposer's return address.

Proposers may withdraw their proposals by notifying the City in writing at any time prior to the deadline for proposal submittal. After the deadline, the proposal will constitute an irrevocable offer, for a period of 90 days. Once opened, proposals become a record of the CITY and will not be returned to the Proposer.

The City cautions proposers to assure actual delivery of mailed or hand-delivered proposals directly to the City Clerk's Office at 780 Fisherman Street, 4th Floor, Opa-locka, Florida 33054 prior to the deadline set for receiving proposals. Telephone confirmation of timely receipt of the proposal may be made by calling (305) 688-4611 before proposal closing time. Any proposal received after the established deadline **will not** be considered and will be returned unopened to the Proposer(s).

1-3. Number of Copies: Proposers shall submit an **original and six (6) copies (a total of 7) plus one copy on CD in PDF format** of the proposal in a sealed, opaque package marked as noted above. The Proposer will be responsible for timely delivery, whether by personal delivery, US Mail or any other delivery medium.

1-4. Development Costs: Neither the City nor its representatives shall be liable for any expenses incurred in connection with preparation of a response to this Request for Proposal. Proposers should prepare their proposals simply and economically, providing a straightforward and concise description of the Proposer's ability to meet the requirements of the RFP.

1-5. Inquiries: The City Clerk will receive written requests for clarification concerning the meaning or interpretations of the RFP, until eight (8) days prior to the submittal date. City personnel are authorized only to direct the attention of prospective Proposers to various portions of the RFP so that they may read and interpret such for themselves. No employee of the City is authorized to interpret any portion of this RFP or give information as to the requirements of the RFP in addition to what is contained in the written RFP document.

1-6. Addendum: The City may record its response to inquiries and any supplemental instructions in the form of written addenda. The CITY may mail written addenda up to three (3) calendar days before the date fixed for receiving the proposals. Proposers shall contact the City to ascertain whether any addenda have been issued. Failure to do so could result in an unresponsive proposal. Any oral explanation given before the RFP opening will not be binding.

All Proposers are expected to carefully examine the proposal documents. Any ambiguities or inconsistencies should be brought to the attention of the City's Purchasing Agent through written communication prior to the opening of the proposals.

1-7. Contract Awards: The City anticipates entering into an Agreement with the Proposer who submits the proposal judged by the City to be most advantageous.

The Proposer understands that this RFP does not constitute an offer or an Agreement with the Proposer. An offer or Agreement shall not be deemed to exist and is not binding until proposals are reviewed, accepted by appointed staff, the best proposal has been identified, approved by the appropriate level of authority within the City and executed by all parties. The City anticipates that the final Agreement will be in substantial conformance with this sample Agreement; nevertheless, Proposers are advised that any Agreement may result from the RFP may deviate from the Sample Agreement.

The City reserves the right to reject all proposals, to abandon the project and/or to solicit and re-advertise for other proposals.

1-8. Contractual Agreement: This RFP and Consultant/Contractor proposal shall be included and incorporated in the final award. The order of contractual precedence will be the Contract or Agreement document, original Terms and Conditions, and Proposer response. Any and all legal action necessary to enforce the award will be held in Miami-Dade County and the contractual obligations will be interpreted according to the laws of Florida. **Any additional contract or agreement requested for consideration by the Proposer must be attached and enclosed as part of the proposal.**

1-9. Selection Process: The proposals will be evaluated and assigned points. The firm with the highest number of points will be ranked first; however, nothing herein will prevent the City from assigning work to any firm deemed responsive and responsible.

The City reserves the right to further negotiate any proposal, including price, with the highest rated

Proposer. If an agreement cannot be reached with the highest rated Proposer, the City reserves the right to negotiate and recommend award to the next highest Proposer or subsequent Proposers until an agreement is reached.

1-10. Public Records: Upon award recommendation or ten (10) days after opening, whichever occurs first, proposals become “public records” and shall be subject to public disclosure consistent with Chapter 119 Florida Statutes. Proposers must invoke the exemptions to disclosure provided by law in the response to the RFP, and must identify the data or other materials to be protected, and must state the reasons why such exclusion from public disclosure is necessary. Document files may be examined, during normal working hours.

1-11. News Releases: The Proposer shall obtain the prior approval of the City Manager’s Office of all news releases or other publicity pertaining to this RFP or the service, study or project to which it relates.

1-12. Insurance: The awarded Proposer(s) shall maintain insurance coverage reflecting at least the minimum amounts and conditions specified herein. In the event the Proposer is a governmental entity or a self-insured organization, different insurance requirements may apply. Misrepresentation of any material fact, whether intentional or not, regarding the Proposers’ insurance coverage, policies or capabilities may be grounds for rejection of the proposal and rescission of any ensuing Agreement.

1. Evidence of General Liability coverage with limits not less than \$1,000,000 per Occurrence/ \$2,000,000 Aggregate (Including Policy Number and Policy Period);
2. Evidence of Auto Liability coverage with limits not less than \$1,000,000 per Occurrence/\$1,000,000 Aggregate (Including Policy Number and Policy Period);
3. Evidence of Workers’ Compensation coverage with statutory limits and Employer’s Liability coverage with limits not less than \$100,000 (Including Policy Number and Policy Period);
4. The City listed as an additional insured (this may be specifically limited to the specific job(s) the contractor will be performing);
5. Minimum 30-day written notice of cancellation.

1-13. Licenses: Proposers, both corporate and individual, must be fully licensed and certified in the State of Florida at the time of RFP submittal. The proposal of any Proposer who is not fully licensed and certified shall be rejected.

1-14. Public Entity Crimes: Award will not be made to any person or affiliate identified on the Department of Management Services’ “Convicted Vendor List”. This list is defined as consisting of persons and affiliates who are disqualified from public contracting and purchasing process because they have been found guilty of a public entity crime. No public entity shall award any contract to, or transact any business in excess of the threshold amount provided in Section 287.017 Florida Statutes for Category Two (currently \$25,000) with any person or affiliated on the “Convicted Vendor List” for a period of thirty-six (36) months from the date that person or affiliate was placed on the “Convicted Vendor List” unless that person or affiliate has been removed from the list. By

signing and submitting the RFP proposal forms, Proposer attests that they have not been placed on the "Convicted Vendor List".

1-15. Code Of Ethics: If any Proposer violates or is a party to a violation of the code of ethics of the City of Opa-locka or the State of Florida with respect to this proposal, such Proposer may be disqualified from performing the work described in this proposal or from furnishing the goods or services for which the proposal is submitted and shall be further disqualified from submitting any future proposals for work, goods or services for the City of Opa-locka.

1-16. Drug-Free Workplace: Preference shall be given to businesses with Drug-Free Work Place (DFW) programs. Whenever two or more proposals which are equal with respect to price, quality, and service are received by the City for the procurement of commodities or contractual services, a proposal received from a business that completes the attached DFW form certifying that it is a DFW shall be given preference in the award process.

1-17. Permits and Taxes: The Proposer shall procure all permits, pay all charges, fees, and taxes, and give all notices necessary and incidental to the due and lawful prosecution of the work.

1-18. Protests: Protests of the plans, specifications, and other requirements of the request for proposal and bids must be received in writing by the City Clerk's Office at least ten (10) working days prior to the scheduled bid opening. A detailed explanation of the reason for the protest must be included. Protests of the award or intended award of the bid or contract must be in writing and received in the City Clerk's Office within seven (7) working days of the notice of award. A detailed explanation of the protest must be included.

1-19. Termination for Convenience: A contract may be terminated in whole or in part by the City at any time and for any reason in accordance with this clause whenever the City shall determine that such termination is in the best interest of the City. Any such termination shall be effected by the delivery to the contractor at least five (5) working days before the effective date of a Notice of Termination specifying the extent to which performance shall be terminated and the date upon which termination becomes effective. An equitable adjustment in the contract price shall be made for the completed service, but no amount shall be allowed for anticipated profit on unperformed services.

PART II

NATURE OF SERVICES REQUIRED

2-1 PURPOSE AND SCOPE OF WORK

The City of Opa-locka seeks proposals from qualified firms to provide Brokerage and Consulting Services for the City's employee benefit services. The successful Proposer will obtain competitive market quotes and will provide enrollment and administrative support services for a wide range of employer group and individual employee benefits as further provided herein.

The City has approximately 248 employees and retirees participating in the benefit plans.

The benefit plans should include the following, but is not limited to:

- Health Insurance
- Dental Insurance
- Life Insurance
- Long Term Disability
- Short Term Disability
- Vision
- Voluntary Benefits Services
- Serve as the City's Broker of Record/Consultant and provide such brokerage services to the Employer to ensure comprehensive and cost-effective benefits are included in the City's benefit plans for selection by the City's eligible employee and retirees.
- Present plan design recommendations that support the City's benefits strategies and position the Employer to comply with Federal, State and other regulatory requirements each year.
- Administer the City's health and welfare plans, including setting reserves, reporting experience and projecting funding levels when applicable.
- Provide ongoing advice on ERISA, COBRA, FMLA, and HIPAA reporting obligations, and other laws and regulations affecting the City's benefit plans as it relates to the insurance products within this RFP.
- Provide comprehensive services (traditional and web-based) necessary to enroll current plan designs, plan modifications and consumer education.
- Provide comprehensive services necessary to serve Voluntary Benefits, including enrollment support and election reconciliation.
- Provide a call center with representatives to respond to City employees and retirees.
- Shall agree that all data exchanged between the selected Proposer and the Employer or prospective customers belongs to the Employer and shall be accessible at any time during the life of the contract for no additional fee.
- The Proposer must provide a benefits administration technology platform to be accessible year-round for new hire enrollment and change in status elections of benefits.
- Provide technical assistance to reduce the overall cost of providing these benefits through a variety of means including developing effective negotiation strategies to expeditiously reduce the absolute cost of health insurance benefits.
- Solicit and negotiate annual renewal of existing coverage including soliciting multiple or alternative proposal coverage.

- A comprehensive summary of responsive quotes from insurance carriers will be presented to the City Manager.
- Respond to all employee issues and questions in a timely manner regarding their benefits.
- Provide City with dedicated agents for any assistance needed.
- Provide the City with support for the wellness program.
- Support the City in organizing and coordinating two (2) employee wellness fairs annually.
- Assist the City in the evaluation and implementation of a wellness and disease management program and measure the effectiveness of the program.
- Provide a program for ACA Tracking and 1095 reporting, which includes mailing out forms.
- Identify claim trends and anomalies in a timely manner and prepare recommendations to the City on actions to be taken, if any.
- Review, process and administer all employee claim issues.
- Review historical claims experience, demographic data trends and plans performance form a financial prospective.
- Coordinate and participate in the implementation and enrollment process and employee meetings.
- Assist in the review and or creation of enrollment materials to enhance the overall perceived value of the benefits and compensation.
- Coordination of annual benefits fair at no cost to the City.
- Preparation of insurance applications, compile and format support information needed and requested by insurance company underwriters.
- Compile and maintain historical underwriting information. Provide copies of this information to the City.
- Development of annual employee benefits statements.

Qualified firms must demonstrate competence and experience in all areas of expertise required by the scope of services.

2-2 PROPOSER QUALIFICATIONS

Adequate information and documentation must be provided in the Proposal to support or confirm satisfaction of the required qualifications below:

- The Proposer shall have extensive experience, expertise and reliability in Municipal Agent of Record services; established reputation, particularly with governmental clients; Proposer must have a minimum of five (5) years of consecutive and successful experience in the aforementioned areas.
- Proposer's track record in providing Agent of Record services to governmental agencies as well as private entities (Please provide a list of current and relevant projects, including client names, titles, phone numbers and email address. Please ensure that contact information is current.)
- Demonstrate an overall combination of skills, prior work experience, business reputation, and commitment to diversity.

2-3 TERM OF CONTRACT

The term of the contract is anticipated to be one fiscal year with a renewal of two one-year terms, subject to negotiation of terms with the contractor and the concurrence of the City of Opa-locka City Commission and availability of annual appropriation.

PART III

PROPOSAL REQUIREMENTS

3-1 RULES FOR PROPOSALS

In order to maintain comparability and enhance the review process, proposals shall be organized in the manner specified below and include all information required herein. The proposal must name all persons or entities interested in the proposal as principals. The proposal must declare that it is made without collusion with any other person or entity submitting a proposal pursuant to this RFP.

3-2 SUBMISSION OF PROPOSALS

The proposal shall be submitted on 8 ½ "x 11" paper, portrait orientation, with headings and sections numbered appropriately. Ensure that all information is written legibly or typed. The following should be submitted for a proposing firm to be considered:

3.2.1 Cover Page - Show the name of Proposer's agency/firm, address, telephone number, name of contact person, date, and the proposal number and description.

3.2.2 Tab 1 - Table of Contents

Include a clear identification of the material by section and by page number.

3.2.3 Tab 2 - Letter of Transmittal

3.2.3.1 Limit to one or two pages.

3.2.3.2 Briefly state the Proposers understanding of the work to be done and make a positive commitment to perform the work.

3.2.3.3 Give the names of the persons who will be authorized to make representations for the Proposer, their titles, addresses and telephone numbers.

3.2.3.4 Provide an official signature of a Corporate Officer certifying the contents of the Proposer's responses to the City's Request for Proposal.

3.2.4 Tab 3 - General Information

3.2.4.1 Name of Business.

3.2.4.2 Mailing Address and Phone Number.

3.2.4.3 Names and contact information of persons to be contacted for information or services if different from name of person in charge.

3.2.4.4 Normal business hours.

3.2.4.5 State if business is local, national, or international and indicate the business legal status (corporation, partnership, etc.).

3.2.4.6 Give the date business was organized and/or incorporated, and where.

3.2.4.7 Give the location of the office from which the work is to be done and the number of professional staff employees at that office.

3.2.4.8 Indicate whether the business is a parent or subsidiary in a group of firms/agencies. If it is, please state the name of the parent company.

3.2.4.9 State if the business is licensed, permitted and/or certified to do business in the State of Florida and attach copies of all such licenses issued to the business entity.

3.2.5 Tab 4 – Project Approach

Describe in detail your proposal to fulfill the requirements of the scope of services listed in section 2.2 of this RFP.

3.2.6 Tab 5 – Experience and Qualifications

3.2.6.1 Specify the number of years the Proposer has been in business.

3.2.6.2 Identify the Proposer's qualifications to perform the services identified in this RFP as listed in section 2-2 of the Scope of Services.

Include resumes, not exceeding one page each, of all key personnel who will be assigned to the City.

3.2.7 Tab 6 – Schedule

3.2.7.1 Include a timetable that identifies the amount of time required to complete each component of the Program.

3.2.7.2 Indicate the earliest available start date for your project team.

3.2.7.3 Indicate the project completion date based on the date provided in 3.2.7.1.

3.2.8 Tab 7 – Pricing of Services

3.2.8.1 Fee basis should be an all-inclusive, base fee.

3.2.9 Tab 8 – References

3.2.9.1 List a minimum of three (3) references in Florida for which the proposer has provided Agent of Record services. Include the name of the organization, brief description of the project, name of contact person telephone number and email address.

3.2.10 Tab 9 – Additional Forms

Proposers must compete and submit as part of its Proposal all of the following forms and/or documents

- Proposer Qualifications
- Certification regarding debarment and suspension
- Drug Free workplace certification

FAILURE TO SUBMIT ALL OF THE ABOVE REQUIRED DOCUMENTATION MAY DISQUALIFY PROPOSER.

PART IV

EVALUATION OF PROPOSALS

4-1 SELECTION COMMITTEE

A Selection Committee, consisting of City personnel, will convene, review and discuss all proposals submitted.

The Selection Committee will use a point formula during the review process to score proposals and assign points in the evaluation process in accordance with the evaluation criteria. The Proposer shall satisfy and explicitly respond to all the requirements of the RFP including a detailed explanation of how the services shall be performed.

Each proposal will be reviewed to determine if the Proposal is responsive to the submission requirements outlines in the Solicitation. A responsive Proposal is one which follows the requirements of this Solicitation that includes all documents are submitted in the format outlined in this Solicitation, is of timely submission, and has the appropriate signatures as required on each document. Failure to comply with these requirements may result in the Proposal being deemed non-responsive. The Contract (s) will be awarded to the most responsive proposer whose Proposal best serves the interest of and represents the best values to the City of Opa-locka.

4-2 EVALUATION CRITERIA

The Committee may select and choose to invite any and/or or all firms to make a presentation and be interviewed by the Committee as part of the evaluation process for this Solicitation. The Committee's decision will be communicated by staff to all Respondents. The Respondent's presentation may clarify but may not modify their submitted proposal. Any discussion between the presenter (s) and Evaluation Committee during presentations are intended only for purposes of providing clarification in response to questions from the Committee.

Category	Points
Experience and Qualifications / Ability of Professional Personnel/Financial Qualifications and experience of assigned staff 1. Expertise of human resources and employee benefits management in public, private and/or non-profit sectors. 2. Qualifications & experience of the firm and its subcontractors/suppliers relevant to the Scope of Work. 3. Availability of qualified personnel. 4. Ability to meet set standards. 5. Previous contracting experience with the other public, private and/or non-profit agencies. 6. Financial resources and capabilities per financial statements. 7. Evidence of insurance and/or bonding capacity. 8. Location of local office.	25

Quality of Services / Technical Approach to the Scope of Work 1. High-quality level of services to be provided to the City. 2. Understanding of City needs. 3. Ability to convey a depth of understanding of the Scope of Work and the firm's capacity to accomplish it successfully. 4. Conveyance of a willingness to work with City staff to maximize resources. 5. Approach to the Project and Methodology. 6. Technical Soundness of the proposal. 7. Applicability of the service offered.	25
Cost Saving Initiatives 1. Development of long-range cost strategies. 2. Innovative ideas for cost containment. 3. Examples of cost-savings implementation for clients that may have saved money.	25
Proposed Fee 1. Pricing Structure 2. Fee Schedule/Cost Proposal 3. Any other additional costs	25
TOTAL	100

4-3 ORAL PRESENTATIONS

Proposers may be required to make individual presentations to the City Selection Committee in order to clarify their proposals. Only those firms with the highest rated scores in accordance with the stated criteria and their weights will be invited to give oral presentations. However, the City has the right to accept the best proposal as submitted, without discussion or negotiation.

If the City determines that such presentations are needed, a time and place will be scheduled for oral presentations. Each Proposer shall be prepared to discuss and substantiate any of the areas of the proposal submitted, and its qualifications to perform the specified services. During the oral presentations, the Proposers should relate their discussion to the evaluation criteria, which will include (but not be limited to) their approach to the project. The proposed Project Manager must be in attendance.

The Evaluation Criteria may be changed for the oral presentations evaluation phase. References and site visits (if completed) shall be included in the final evaluation criteria, along with other criteria and weights as determined by the Selection Committee. Finalists will be informed as to the revised criteria, if any, prior to their oral presentation.

Additionally, prior to award of an Agreement pursuant to this RFP, the City may require Proposers to submit such additional information bearing upon the Proposer's ability to perform the services in the Agreement as the City deems appropriate.

4-4 FINAL SELECTION

The City of Opa-locka will select the firm that meets the best interests of the City. The City shall be the sole judge of its own best interests, the proposals, and the resulting negotiated agreement. The

City's decisions will be final. Following the notification of the selected firm, it is expected that an Agreement will be executed between both parties. City staff will recommend award to the responsible Proposer whose Proposal is determined to provide overall best value to the City, considering the evaluation factors in this RFP.

4-5 AWARD AND CONTRACT EXECUTION

After review by the Selection Committee of the proposals and oral presentations a recommendation will be made to the City Manager for submission to the City Commission for final approval. Upon Commission authorization, contract negotiations will be initiated with the first ranked firm. If those negotiations are unsuccessful, the City will formally terminate negotiations with the first ranked firm and will commence contract negotiations with the next ranked firm, etc. Upon successful contract negotiations with the prevailing firm, the remaining firms will be notified that the process has been completed and that they were not selected.



RFP NO. 21-0629100

AGENT OF RECORD FOR EMPLOYEE BENEFIT PROGRAMS

PROPOSER QUALIFICATIONS

The Proposer, as a result of this proposal, **MUST** hold a County and/or Municipal Contractor's Occupational License in the area of their fixed business location. The following information **MUST** be completed and submitted with the proposal to be considered:

1. Legal Name and Address:

Name: _____

Address: _____

City, State, Zip: _____ Phone/Fax: _____

2. Check One: Corporation () Partnership () Individual ()

3. If Corporation, state:

Date of Incorporation: _____ State in which Incorporated: _____

4. If an out-of-state Corporation, currently authorized to do business in Florida, give date of such authorization: _____

5. **Name and Title of Principal Officers**

Date Elected:

_____	_____
_____	_____
_____	_____
_____	_____

6. The length of time in business: _____ years

7. The length of time (continuous) in business as a service organization in Florida:
_____ years

8. Provide a list of at least three commercial or government references that the bidder has supplied service/commodities meeting the requirements of the City of Opa-locka specification, during the last twenty-four months.

9. A copy of County and/or Municipal Occupational License(s)

Note: Information requested herein and submitted by the proposers will be analyzed by the City of Opa-locka and will be a factor considered in awarding any resulting contract. The purpose is to insure that the Contractors, in the sole opinion of the City of Opa-locka, can sufficiently and efficiently perform all the required services in a timely and satisfactory manner as will be required by the subject contract. If there are any terms and/or conditions that are in conflict, the most stringent requirement shall apply.



RFP NO: 21-0629100
PRICE PROPOSAL FORM

AGENT OF RECORD FOR EMPLOYEE BENEFIT PROGRAMS

PROPONENT understands and agrees that the Contract Price is the lump sum to furnish and install all of the Work complete in place. Vendor's price will not be adjusted unless the CITY changes the scope of the Project after the Contract Date.

As such, the Vendor shall furnish all labor, materials, equipment, tools, superintendence and services necessary to provide a complete, in place Project for the Proposed Price of:

LUMP SUM PRICE: \$_____

SUBMITTED
THIS

DAY OF

2021.

BID SUBMITTED BY:

Company

Telephone Number

Name of Person Authorized to Submit
Bid

Fax Number

Signature

Email Address

Title



CITY OF OPA-LOCKA

CERTIFICATION REGARDING DEBARMENT, SUSPENSION PROPOSED DEBARMENT AND OTHER MATTERS OF RESPONSIBILITY

1. The Proposer certifies, to the best of its knowledge and belief, that the Proposer and/or any of its Principals:

A. Are not presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency.

B. Have not, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property; and

C. Are not presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph 1-B of this provision.

2. The Proposer has not, within a three-year period preceding this offer, had one or more contracts terminated for default by any City, State or Federal agency.

A. "Principals," for the purposes of this certification, means officers; directors; owners; partners; and, persons having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions). This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution Under Section 1001, Title 18, United States Code.

B. The Proposer shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Proposer learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

C. A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the Proposer's responsibility. Failure of the Proposer to furnish a certification or provide such additional information as requested by the Contracting Officer may render the Proposer non-responsive.

D. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of a Proposer is not required to exceed

that which is normally possessed by a prudent person in the ordinary course of business dealings.

E. The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Proposer knowingly rendered an erroneous certification, in addition to other remedies available to the Government, the Contracting Officer may terminate the contract resulting from this solicitation for default.

AS THE PERSON AUTHORIZED TO SIGN THE STATEMENT, I CERTIFY THAT THIS FIRM COMPLIES FULLY WITH THE ABOVE REQUIREMENTS.

Signature _____

Printed Name _____



**CITY OF OPA-LOCKA
RFP NO. 21-0629100**

DRUG-FREE WORKPLACE CERTIFICATION FORM

Whenever two (2) or more bids/proposals, which are equal with respect to price, quality, and service, are received by the CITY OF OPA-LOCKA for the procurement of commodities or contractual services, a bid/proposal received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of controlled substances is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in number (1).
4. In the statement specified in number (1), notify the employees that as a condition for working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction on or plea of guilty or no contest to any violation of Chapter 893, Florida Statutes or of any controlled substance law of the United States or any singular state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of Section 287.087, Florida Statutes.

This Certification is submitted by _____ the
(Name)
_____ of _____
(Title/Position) (Company)

who does hereby certify that said Company has implemented a drug-free workplace program, which meets the requirements of Section 287.087, Florida Statutes, which are identified in numbers (1) through (6) above.

Date

Signature



**CITY OF OPA-LOCKA
NON-COLLUSION AFFIDAVIT**

STATE OF FLORIDA - COUNTY OF MIAMI DADE

_____ being first duly sworn, deposes and says that:

- (1) He/She/They is/are the _____
(Owner, Partner, Officer, Representative or Agent) of
_____ the PROPONENT that has submitted the attached
proposal;
- (2) He/She/They is/are fully informed respecting the preparation and contents of the
attached Proposal and of all pertinent circumstances respecting such Proposal;
- (3) Such Proposal is genuine and is not a collusive or sham Proposal;
- (4) Neither the said PROPONENT nor any of its officers, partners, owners, agents,
representatives, employees or parties in interest, including this affiant, have in any way
colluded, conspired, connived or agreed, directly or indirectly, with any other
PROPONENT, firm, or person to submit a collusive or sham Proposal in connection with
the Work for which the attached Proposal has been submitted; or to refrain from
Proposing in connection with such Work; or have in any manner, directly or indirectly,
sought by agreement or collusion, or communication, or conference with any
PROPONENT, firm, or person to fix any overhead, profit, or cost elements of the Proposal
or of any other PROPONENT, or to fix any overhead, profit, or cost elements of the
Proposed Price or the Proposed Price of any other PROPONENT, or to secure through any
collusion, conspiracy, connivance, or unlawful agreement any advantage against
(Recipient), or any person interested in the proposed Work;
- (5) The price or prices quoted in the attached Proposal are fair and proper and are not
tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of
the PROPONENT or any other of its agents, representatives, owners, employees or parties
of interest, including this affiant.

Signed, sealed and delivered in the presence of:

Witness

By: _____
Signature

Witness

Print Name and Title



NON-DISCRIMINATION AFFIDAVIT

I, the undersigned, hereby duly sworn, depose and say that the organization, business or entity represented herein shall not discriminate against any person in its operations, activities or delivery of services under any agreement it enters into with the City of Opa-locka. The same shall affirmatively comply with all applicable provisions of federal, state and local equal employment laws and shall not engage in or commit any discriminatory practice against any person based on race, age, religion, color, gender, sexual orientation, national origin, marital status, physical or mental disability, political affiliation or any other factor which cannot be lawfully used as a basis for service delivery.

By: _____

Title: _____

Sworn and subscribed before this

____ day of _____, 20____

Notary Public, State of Florida

(Printed Name)

My commission expires: _____



E-VERIFY

Effective January 1, 2021, public and private employers, contractors and subcontractors will be required to register with, and use of the E-verify system in order to verify the work authorization status of all newly hired employees. Vendor/Consultant/Contractor acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of:

- a) All persons employed by Vendor/Consultant/Contractor to perform employment duties within Florida during the term of the contract; and
- b) All persons (including sub-vendors/sub-consultants/sub-contractors) assigned by Vendor /Consultant/ Contractor to perform work pursuant to the contract with the Department. The Vendor /Consultant/ Contractor acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the contract is a condition of the contract with the City; and

By entering into a Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes but is not limited to utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The contractor shall maintain a copy of such affidavit for the duration of the contract. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. If t contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination. The Contractor acknowledges it is liable to the City for any additional costs as a result of termination of the contract due to Contractor's failure to comply with the provisions herein.



E-VERIFY FORM

Definitions:

“Contractor” means a person or entity that has entered or is attempting to enter into a contract with a public employer to provide labor, supplies, or services to such employer in exchange for salary, wages, or other remuneration.

“Subcontractor” means a person or entity that provides labor, supplies, or services to or for a contractor or another subcontractor in exchange for salary, wages, or other remuneration.

Effective January 1, 2021, public and private employers, contractors and subcontractors will begin required registration with, and use of the E-verify system in order to verify the work authorization status of all newly hired employees. Vendor/Consultant/Contractor acknowledges and agrees to utilize the U.S. Department of Homeland Security’s E-Verify System to verify the employment eligibility of:

- a) All persons employed by Vendor/Consultant/Contractor to perform employment duties within Florida during the term of the contract; and
- b) All persons (including sub-vendors/subconsultants/subcontractors) assigned by Vendor/Consultant/Contractor to perform work pursuant to the contract with the Department. The Vendor/Consultant/Contractor acknowledges and agrees that use of the U.S. Department of Homeland Security’s E-Verify System during the term of the contract is a condition of the contract with the City of Opa-locka; and

Should vendor become successful Contractor awarded for the above-named project, by entering into this Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes but is not limited to utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The contractor shall maintain a copy of such affidavit for the duration of the contract. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. If this contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination.

Company Name: _____

Authorized Signature: _____

Print Name: _____

Title: _____

Date: _____



Agent of Record for Employee Benefit Programs

RFP#21-0629100

ADDENDUM-01

Please be advised that the Pre-Bid Meeting for RFP No. 21-0629100 (Agent of Record for Employee Benefit Programs) will be held in person at Sherbondy Village, 215 Perviz Avenue, Opa-locka, FL 33054 AND via zoom. To participate by Zoom please use the call in information listed below:

Join Zoom Meeting

<https://us02web.zoom.us/j/89623252819?pwd=YWljZURPUTZuVU9sMzRXTE0zeFBtQT09>

Meeting ID: 896 2325 2819

Passcode: 5KkVlz

One tap mobile

+16465588656,,89623252819#,,,,*468351# US (New York)

+13017158592,,89623252819#,,,,*468351# US (Washington DC)

Dial by your location

+1 646 558 8656 US (New York)

+1 301 715 8592 US (Washington DC)

+1 312 626 6799 US (Chicago)

+1 669 900 9128 US (San Jose)

+1 253 215 8782 US (Tacoma)

+1 346 248 7799 US (Houston)

Meeting ID: 896 2325 2819

Passcode: 468351

Find your local number: <https://us02web.zoom.us/j/89623252819?pwd=YWljZURPUTZuVU9sMzRXTE0zeFBtQT09>



Agent of Record for Employee Benefit Programs

RFP#21-0629100

ADDENDUM-02

Please see responses to all questions asked to date:

1. Which firm current serves as the City's current benefits broker/consultant and what is the current annual compensation (stating whether commission or flat fee)?
Sapoznik Insurance / Commission
2. Are the City's current health and dental plans fully insured or self-funded?
No, the City pays 100% for employee only and 50% for dependents
3. If self-funded, does the city currently use the services of an actuary to set rates/reserves and file the report of actuarial soundness with the state? If so, which firm and what is annual cost of services?
N/A
4. Please state the name of the carrier for each line of City benefits coverage including any voluntary/supplemental coverages currently being offered? Please include a copy of the current employee benefits handbook.
Please see the attachment
5. Does the City currently utilize a web-based enrollment platform for open enrollment and qualifying events? If so, which one and what is the annual cost associated? Who absorbs the cost – the City or the current broker/consultant?
Yes, the broker absorbs the cost
6. What is the name of the City's current payroll software?
ADP
7. Does the City currently host two wellness fairs each year in addition to the benefits fair at open enrollment? Can you elaborate on the need for two wellness fairs each year?
Yes, continuity in promoting wellness & health education



8. Regarding the two requested wellness fairs each year, can you please describe the services provided at the fairs (i.e. what kind of local vendors or carriers attend?)

Screenings, educational sessions, health activities, wellness activities
Health and Insurance vendors are in attendance

Are screenings or other health services performed during the fair?)

Yes

9. What software does the City currently use for ACA hours tracking, completing forms and mailing out forms? What is the annual cost?

Diversified Administration Inc.
Service & cost provided by current broker

10. How many part-time employees does the City have.

17

11. The Scope of Work states "Development of annual employee benefits statements" – Would these statements include benefits information only or additional information such as salary, vacation, or retirements benefits?

Benefits information only, but we would like to add salary, vacation, or retirement benefits

12. **Please use ancillary census template for the following:**

Date of Birth (All lines of coverage)

Gender (All lines of coverage)

Salary (Needed for Voluntary Life, "X Salary" options, All disability)

- If including bonus/commissions/K1 – include base in salary column and create another column for these amounts

Occupation (All disability)

Employee Home Zip Code (Dental, Vision (All sizes) and Life quotes for groups over 100+)

Name (needed if we would need to cross-reference with a current invoice for elections of dental, vision, voluntary/contributory coverages)

Current Elections (Dental, Vision, Voluntary/Contributory coverages)

Please see the attachment

13. **If coverage is in force currently the following documents are needed:**

Current Benefit Summaries

Current Certificates

Current Rates and/or last renewal

Invoice if elections are not on the census



14. Experience will be needed in the following scenarios and broken down by month for the last 24-36 months; premium paid vs. claims paid:

Dental and STD (100+ Enrolled)

Life (500+Enrolled)

LTD (200+Enrolled)

Please see the attachment

15. What is participation rate?

Please provide clarity on the question

16. We will also need to know how much the group will be contributing towards the premium for each line of business.

The City pays 100% for employee only and 50% for dependents

17. On page 11 you ask for a timetable to show time required to complete each component of the project and then on 3.2.7.3 it asks to indicate the project completion date based on date provided in 3.2.7.1.

Timeline you anticipate to complete the program

18. Are you referring to the 'scope of services' as the 'project.' Need clarification on what you want to see on the schedule.

Yes, the Scope of Service is the project

19. On page 11 Tab 6, 3.2.7

Can you please clarify what you mean by schedule? Is it a timeline of when we need items to implement your program to meet your effective date?

Timeline you anticipate to complete the program

20. On page 16 the Price Proposal Form

The cost being asked for is in a lump sum. Does that mean that you are requesting an annual fee or are you open to having a commission-based cost structure?

It should be a commission-based cost structure

21. Will you be responding to questions as they come in or will you be issuing one addendum to respond to all questions?

The City will be responding to questions up until eight (8) days prior to the submittal date.

22. Are you amenable to looking at other funding options: level funded, self-funded, etc.?

Not at this time



23. If we complete the RFP through the Demand Star e-bid website, do you still require an original, six copies, and a USB drive delivered to the Office of the City Clerk?

No

24. During the pre-bid meeting on Tuesday you shared prospective bidders can still ask questions yet the deadline for questions was not confirmed. Has there been a communication released to confirm the deadline for questions? If so, I did not receive the communication.

Pursuant to Page 5 of the RFP document, written requests for clarification may be submitted until eight (8) days prior to the submittal date.

City of Opa Locka 24 Payroll Ded. 10/01/2020

NOTE: COOL is paid 26 times BUT City of Opa Locka only deducts 24 (no deductions month of December)

HMO OA 7422	Monthly AvMed HMO Rate	Monthly Employer Contribution	Plus 50% of Dependent Cost	TOTAL EMPLOYER MONTHLY CONT	TOTAL EMPLOYEE MONTHLY CONT	Employee Semi- Monthly payroll deduction
EE Only	\$431.53	\$431.53	\$0.00	\$431.53	\$0.00	\$0.00
EE + SP	\$863.06	\$431.53	\$226.74	\$658.27	\$204.80	\$102.40
EE+CH	\$819.91	\$431.53	\$205.16	\$636.69	\$183.22	\$91.61
FAM	\$1,337.74	\$431.53	\$464.08	\$895.61	\$442.14	\$221.07

POS Choice 7470	Monthly AvMed POS Rate	Monthly Employer Contribution	Plus 50% of Dependent Cost	TOTAL EMPLOYER MONTHLY CONT	TOTAL EMPLOYEE MONTHLY CONT	Employee Semi- Monthly payroll deduction
EE Only	525.76	431.53	\$0.00	\$431.53	\$94.23	\$47.12
EE + SP	1051.52	431.53	\$226.74	\$658.27	\$393.25	\$196.63
EE+CH	998.95	431.53	\$205.16	\$636.69	\$362.26	\$181.13
FAM	1629.86	431.53	\$464.08	\$895.61	\$734.25	\$367.13

GAP/Am. Fidelity	Mo. Prem	Employer Contribution	Employee Semi- Monthly Deduction
EE	\$41.25	\$0.00	\$20.63
E+SP	\$93.53	\$0.00	\$46.77
E+CH	\$70.38	\$0.00	\$35.19
FAM	\$122.65	\$0.00	\$61.33

****As of 10/1/2017 - GAP is now 100% employee paid**

METLIFE MET290 Dental HMO	Mo. Prem.	ER Contribution	EE Cont.	Employee Semi Monthly Deduction
EE Only	\$11.86	\$11.86	\$0.00	\$0.00
EE + SP	\$20.75	\$11.86	\$8.89	\$4.45
EE+CH	\$24.90	\$11.86	\$13.04	\$6.52
FAM	\$34.99	\$11.86	\$23.13	\$11.57

METLIFE Dental PPO	Mo. Prem.	ER Contribution		Employee Semi Monthly Deduction
EE Only	\$40.42	\$11.86	\$28.56	\$14.28
EE + SP	\$80.83	\$11.86	\$68.97	\$34.49
EE+CH	\$97.48	\$11.86	\$85.62	\$42.81
FAM	\$145.48	\$11.86	\$133.62	\$66.81

METLIFE Vision	Mo. Prem.	Semi Monthly P/R Deduction		
EE Only	\$6.80	\$3.40		
EE + SP	\$13.62	\$6.81		
EE+CH	\$14.02	\$7.01		
FAM	\$21.79	\$10.90		

**MetLife**

Metropolitan Life Insurance Company



PAGE 1

0001

TO: CITY OF OPA LOCKA
 ATTN: KIERRA WARD
 780 FISHERMAN STREET
 4TH FLOOR/HUMAN RESOURCES
 OPA LOCKA FL 33054

POLICY NUMBER: 0001

PRINT DATE: 05 14 2021

AMOUNT PAID: 0001

For customer service please contact us at: 1-800-ASK-4MET (275-4638) (Prompt 2)

PLEASE NOTE THE FOLLOWING:

- PLEASE COMPLETE A CHANGE FORM FOR ALL CHANGES WHICH CAN BE LOCATED AT <http://www.whymetlife.com/adminmanual/>
- ASK YOUR ACCOUNT SPECIALIST ABOUT ELECTRONIC FUNDS TRANSFER (EFT)
- FOR ADDITIONAL INFORMATION, SEE REVERSE SIDE OF THE LAST PAGE

NAME OF INSURED / LO. NUMBER	INSURED BIRTH MO. - YR.	CLASS # ADJ. DATE	ST CODE	BENEFIT TITLE	FAM. IND.	ADJ. CODE	PREMIUM	VOLUME	TOTAL PREMIUM
ESIN ABIA [REDACTED]	01-1951	0001	TI VV	DENTL VIS	A A		145.48 21.79		167.27
GLADYS ACHI [REDACTED]	03-1968	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
YSLANDE AGENOR [REDACTED]	04-1987	0001	TI	DENTL	C		40.42		40.42
HUGO ALVARADO [REDACTED]	09-1980	0001	TI VV	DENTL VIS	A A		145.48 21.79		167.27
JOHN PATE [REDACTED]	11-1983	0003	TI VV	DENTL VIS	D D		97.48 14.02		111.50
AIRIA AUSTIN [REDACTED]	10-1960	0001	TI VV	DENTL VIS	A A		145.48 21.79		167.27
WILLIE BAILEY [REDACTED]	01-1958	0002	TP VV	DMOFL VIS	B B		20.75 13.62		34.37
KAMA BARNES [REDACTED]	05-1976	0002	TP VV	DMOFL VIS	A B		34.99 13.62		48.61

BILL TO DATE 11/30/2021

TO: CITY OF OPA LOCKA

PRINT DATE: 05 14 2021

FOR ADDITIONAL INFORMATION, SEE REVERSE SIDE

NAME OF INSURED / I.D. NUMBER	INSURED BIRTH MO. - YR.	CLASS & ADJ. DATE	BT CODE	BENEFIT TITLE	FAM. IND.	ADJ. CODE	PREMIUM	VOLUME	TOTAL PREMIUM
ROBERT BELL [REDACTED]	12-1969	0002	TP	DMOFL	C		11.86		11.86
RUBEN BORRERO [REDACTED]	08-1969	0002	TP VV	DMOFL VIS	B B		20.75 13.62		34.37
GERMAN BOSQUE [REDACTED]	08-1963	0001	TI VV	DENTL VIS	B B		80.83 13.62		94.45
ANDREA BRAYNON [REDACTED]	05-1957	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
MOHAN BRITTON [REDACTED]	11-1972	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
TIQUELLA BROWN [REDACTED]	04-1987	0002	TP	DMOFL	D		24.90		24.90
SHERINE BULLOCK XXXX [REDACTED]	04-1981	0002	TP VV	DMOFL VIS	D D		24.90 14.02		38.92
ALVIN BURKE XXXX [REDACTED]	04-1954	0004	TP	DMOFL	C		11.86		11.86
IVIS BUSTILLO XXXX [REDACTED]	02-1977	0002	TP	DMOFL	D		24.90		24.90
FREDRIK CADET XXXX [REDACTED]	03-1993	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
OWEN CARNEY XXXX [REDACTED]	05-1965	0001	TI VV	DENTL VIS	D D		97.48 14.02		111.50
CLEEFORD CHARLES XXXX [REDACTED]	06-1993	0002	TP	DMOFL	C		11.86		11.86

**MetLife**

Metropolitan Life Insurance Company

PAGE 3

0001



TO: CITY OF OPA LOCKA

BILL DUE DATE: 06/01/2021

PRINT DATE: 05/14/2021

FOR ADDITIONAL INFORMATION, SEE REVERSE SIDE

NAME OF INSURED / ID. NUMBER	INSURED BIRTH MO. - YR.	CLASS # ADJ. DATE	BT CODE	BENEFIT TITLE	FAM. IND.	ADJ. CODE	PREMIUM	VOLUME	TOTAL PREMIUM
VENIS CHARLOT XXXXX	09-1964	0002	TP	DMOFL	C		11.86		11.86
DARON L CHIVERTON XXXXX	11-1973	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
ANYELINA CUEVAS XXXXX	09-1978	0001	TI	DENTL	C		40.42		40.42
DIANE CUREDARDEN XXXXX	12-1963	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
LUBOTES DAUPHIN XXXXX	01-1981	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
CHRIS DAVIS XXXXX	09-1987	0003	TI VV	DENTL VIS	C C		40.42 6.80		47.22
CORION J DELAINE XXXXX	05-1990	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
PANEL DESIR XXXXX	10-1959	0001	TI VV	DENTL VIS	A D		145.48 14.02		159.50
FRANTZ DONAT XXXXX	03-1974	0002	TP VV	DMOFL VIS	B A		20.75 21.79		42.54
DEON EDWARDS XXXXX	01-1971	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
GEORGE ELLIS JR XXXXX	09-1958	0003	TI VV	DENTL VIS	B B		80.83 13.62		94.45
JEFFREY C EUGENE XXXXX	06-1986	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22

**MetLife**

Metropolitan Life Insurance Company

PAGE 4

0001

WILL EXPIRE DATE 06-01-2021

TO: CITY OF OPA LOCKA

PRINT DATE: 05 14 2021

FOR ADDITIONAL INFORMATION, SEE REVERSE SIDE

NAME OF INSURED / ID. NUMBER	INSURED BIRTH MO. - YR.	CLASS & ADJ. DATE	ST CODE	BENEFIT TITLE	FAM. IND.	ADJ. CODE	PREMIUM	VOLUME	TOTAL PREMIUM
JEFFREY PAULKNER XXXXX	04-1964	0002	TP VV	DMOFL VIS	A A		34.99 21.79		56.78
GLENN PINLAY XXXXX	07-1966	0002	TP	DMOFL	C		11.86		11.86
JOANNA FLORES XXXXX	12-1974	0001	TI VV	DENTL VIS	D D		97.48 14.02		111.50
SHARON GALLIMORE XXXXX	04-1971	0004	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
GREGORY GAY XXXXX	06-1963	0001	TI VV	DENTL VIS	A A		145.48 21.79		167.27
MARIELISA GOMEZ XXXXX	03-1995	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
CARLOS GONZALEZ XXXXX	03-1966	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
MARCOS GONZALEZ XXXXX	03-1973	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
RANDY GRICE XXXXX	06-1987	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
JOHNNY GUANTE XXXXX	10-1967	0002	TP	DMOFL	C		11.86		11.86
YESLY GUILLEN XXXXX	12-1977	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
JOHNNY HALL XXXXX	01-1962	0001	TI VV	DENTL VIS	B B		80.83 13.62		94.45



Metropolitan Life Insurance Company

PAGE 5

0001



PRINT DATE: 05 14 2021

TO: CITY OF OPA LOCKA

FOR ADDITIONAL INFORMATION, SEE REVERSE SIDE

NAME OF INSURED / ID. NUMBER	INSURED BIRTH MO. - YR.	CLASS & ADJ. DATE	ST CODE	BENEFIT TITLE	FAM. IND.	ADJ. CODE	PREMIUM	VOLUME	TOTAL PREMIUM
KINSHANNTA HALL XXXXX	02-1989	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
JOYANIA HAWTHORNE XXXXX	08-1980	0002	TP VV	DMOFL VIS	A A		34.99 21.79		56.78
LAWRENCE HOLBOROW XXXXX	03-1964	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
SEKENA HOLLIS XXXXX	05-1976	0001	TI VV	DENTL VIS	B B		80.83 13.62		94.45
HASSAN HOSEIN XXXXX	04-1986	0001	TI	DENTL	C		40.42		40.42
MAKENDZY JEAN BAPTISTE XXXXX	09-1982	0002	TP	DMOFL	C		11.86		11.86
STANLEY JEANFRANCOIS XXXXX	04-1982	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
NIKEYA JENKINS XXXXX	03-1982	0001	TI	DENTL	C		40.42		40.42
JIMMY JOHNSON XXXXX	06-1953	0002	VV	VIS	C		6.80		6.80
ROBERT G JOHNSON XXXXX	10-1966	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
DANIEL KELLY XXXXX	01-1983	0001	TI VV	DENTL VIS	A A		145.48 21.79		167.27
RONNIE KING XXXXX	12-1955	0002	TP VV	DMOFL VIS	B B		20.75 13.62		34.37

RECEIVED DATE 05 14 2021

TO: CITY OF OPA LOCKA

PRINT DATE: 05 14 2021

FOR ADDITIONAL INFORMATION, SEE REVERSE SIDE

NAME OF INSURED / I.D. NUMBER	INSURED BIRTH MO. - YR.	CLASS & ADL DATE	BT CODE	BENEFIT TITLE	FAM. IND.	ADJ. CODE	PREMIUM	VOLUME	TOTAL PREMIUM
CORY M KROTENBERG XXXXX	11-1971	0002	TP	DMOFL	D		24.90		24.90
TWANNA L LATTERYNEEL XXXXX	01-1969	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
ONIAS LAURENT XXXXX	10-1990	0002	TP	DMOFL	C		11.86		11.86
SHAMECCA LAWSON XXXXX	10-1980	0001	TI VV	DENTL VIS	B B		80.83 13.62		94.45
JOSEPH LEE XXXXX	11-1970	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
GERALD LRE XXXXX	10-1959	0002	TP VV	DMOFL VIS	B B		20.75 13.62		34.37
KING LEONARD XXXXX	04-1972	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
GABRIELA LLANES XXXXX	12-1992	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
ALAINDY LOUIS XXXXX	06-1998	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
GINETTE LUXAMA XXXXX	07-1977	0001	TI	DENTL	D		97.48		97.48
KENDRICK MCBRYE XXXXX	03-1963	0002	TP	DMOFL	C		11.86		11.86
NARCISO MONTERO XXXXX	10-1959	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22

**MetLife**

Metropolitan Life Insurance Company

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BILL DUE DATE: 06 01 2021

TO: CITY OF OPA LOCKA

PRINT DATE: 05 14 2021

FOR ADDITIONAL INFORMATION, SEE REVERSE SIDE

NAME OF INSURED / ID. NUMBER	INSURED BIRTH MO. - YR.	CLASS # ADJ. DATE	BT CODE	BENEFIT TITLE	FAM. IND.	ADJ. CODE	PREMIUM	VOLUME	TOTAL PREMIUM
MARIE NOEL XXXXX	09-1988	0002	TP VV	DMOFL VIS	D D		24.90 14.02		38.92
KERBY F NORD XXXXX	09-1980	0001	TI	DENTL	C		40.42		40.42
AMBROSE OBASI XXXXX	04-1960	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
MARTHA PARFAITFELIX XXXXX	07-1972	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
TANGELAR PARKER XXXXX	11-1966	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
DELVEN PATTERSON XXXXX	08-1983	0001	TI VV	DENTL VIS	B B		80.83 13.62		94.45
MANUEL PEREZ XXXXX	07-1954	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
SERGIO M PEREZ XXXXX	12-1986	0001	TI	DENTL	C		40.42		40.42
MARILYN PETITFRERE XXXXX	10-1964	0001	TI VV	DENTL VIS	D D		97.48 14.02		111.50
KATHY PHILLIPS XXXXX	02-1960	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
OLGA PICHARDO XXXXX	11-1944	0002	TP	DMOFL	C		11.86		11.86
MATTHEW PIGATT XXXXX	09-1986	0003	TI VV	DENTL VIS	A A		145.48 21.79		167.27

BNL DATE 05/14/2021

TO: CITY OF OPA LOCKA

PRINT DATE: 05 14 2021

FOR ADDITIONAL INFORMATION, SEE REVERSE SIDE

NAME OF INSURED / LD. NUMBER	INSURED BIRTH MO. - YR.	CLASS & ADJ. DATE	BT CODE	BENEFIT TITLE	FAM. IND.	ADJ. CODE	PREMIUM	VOLUME	TOTAL PREMIUM
DWAYNE RAMIKIE XXXXX	06-1983	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
ZONYA RAY XXXXX	10-1967	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
JOHN R RENAUD XXXXX	05-1973	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
ANDREW RIVERA XXXXX	02-1986	0002	TP	DMOFL	D		24.90		24.90
BARBARA ROBINSON XXXXX	02-1960	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
LUIS RODRIGUEZ XXXXX	04-1959	0002	TP	DMOFL	C		11.86		11.86
NELSON RODRIGUEZ XXXXX	09-1981	0001	TI VV	DENTL VIS	D D		97.48 14.02		111.50
ALVIN ROGERS XXXXX	01-1979	0001	TI	DENTL	D		97.48		97.48
JAIRO ROSERO XXXXX	04-1982	0001	TI	DENTL	C		40.42		40.42
WILKINSON SAINT JEAN XXXXX	05-1981	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
BRADLEY SAINTAINE XXXXX	02-1991	0002	TP	DMOFL	C		11.86		11.86
LUIS SERRANO XXXXX	04-1974	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22

**MetLife**

Metropolitan Life Insurance Company



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BILL DUE DATE 15 01 2021

TO: CITY OF OPA LOCKA

PRINT DATE: 05 14 2021

FOR ADDITIONAL INFORMATION, SEE REVERSE SIDE

NAME OF INSURED / I.D. NUMBER	INSURED BIRTH MO. - YR.	CLASS II ADJ. DATE	BT CODE	BENEFIT TITLE	FAM. IND.	ADJ. CODE	PREMIUM	VOLUME	TOTAL PREMIUM
BRANDEN SHIPMAN XXXXX	08-1987	0002	TP VV	DMOFL VIS	A A		34.99 21.79		56.78
LOWRIE C SIMON XXXXX	12-1979	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
MICHAEL A STEEL XXXXX	03-1973	0002	TP VV	DMOFL VIS	A C		34.99 6.80		41.79
PRUDENCE SWIFT XXXXX	08-1971	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
JOHANE TAYLOR XXXXX	11-1986	0002	TP	DMOFL	C		11.86		11.86
JOHN TAYLOR XXXXX	10-1988	0004	TP VV	DMOFL VIS	D D		24.90 14.02		38.92
KENNETH THOMAS XXXXX	05-1971	0001	TI VV	DENTL VIS	C D		40.42 14.02		54.44
YVETTE THOMAS XXXXX	01-1961	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
NATALYA THOMPSON XXXXX	03-1981	0001	TI	DENTL	C		40.42		40.42
JOSE TRIGO XXX	07-1961	0001	TI VV	DENTL VIS	A A		145.48 21.79		167.27
DERRICK TROUPE XXXXX	08-1961	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
EDWARD VEGA XXXXX	09-1962	0001	TI VV	DENTL VIS	B B		80.83 13.62		94.45

BILL DUE DATE: 06 01 2021

TO: CITY OF OPA LOCKA

PRINT DATE: 05 14 2021

FOR ADDITIONAL INFORMATION, SEE REVERSE SIDE

NAME OF INSURED / I.D. NUMBER	INSURED BIRTH MO. - YR.	CLASS & ADJ. DATE	OT CODE	BENEFIT TITLE	FALL IND.	ADJ. CODE	PREMIUM	VOLUME	TOTAL PREMIUM
LUDWIN VIELMAN XXXXX	03-1971	0001	TI VV	DENTL VIS	A A		145.48 21.79		167.27
KERBY VITAL XXXXX	11-1986	0001	TI	DENTL	D		97.48		97.48
LATRICE WALDEN XXX	06-1968	0002	TP	DMOFL	C		11.86		11.86
ERIC WALTON XXX	09-1988	0001	TI VV	DENTL VIS	C C		40.42 6.80		47.22
KIERRA WARD XXXX	04-1986	0002	TP	DMOFL	D		24.90		24.90
FLORENCE WEST XXX	03-1958	0002	TP	DMOFL	C		11.86		11.86
WILMA WILCOX XXX	06-1957	0001	TI VV	DENTL VIS	B B		80.83 13.62		94.45
TERRELL WILLIAMS XXX	05-1974	0002	TP VV	DMOFL VIS	D D		24.90 14.02		38.92
KAKWANZANA WILLIAMS XXX	11-1982	0002	TP	DMOFL	D		24.90		24.90
VERONICA WILLIAMS XXXX	08-1975	0004	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
WILLIE WITHERSPOON XXXX	09-1964	0002	TP VV	DMOFL VIS	C C		11.86 6.80		18.66
FLORALBA WRIGHT XXX	09-1968	0002	TP VV	DMOFL VIS	C B		11.86 13.62		25.48

**MetLife**

Metropolitan Life Insurance Company



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BILL DUE DATE: 05 14 2021

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PRINT DATE: 05 14 2021

FOR ADDITIONAL INFORMATION, SEE REVERSE SIDE

NAME OF INSURED / ID. NUMBER	INSURED BIRTH MO. - YR.	CLASS # ADJ. DATE	BT CODE	BENEFIT TITLE	FAM. IND.	ADJ. CODE	PREMIUM	VOLUME	TOTAL PREMIUM
NELSON ZONICLE XXXX	12-1952	0002	TP VV	DMOFL VIS	B B		20.75 13.62		34.37
TOTAL FOR THIS BILLING PERIOD									5,967.97
ADJUSTMENTS									
CLEEFORD CHARLES XXXX		04 01 2021	TP VV	DMOFL VIS	A T		23.72 20.40-		23.72
VENIS CHARLOT XXXX		04 01 2021	TP	DMOFL	A		23.72		23.72
WUI HUDSON FRANCOIS XXXX		03 01 2021	TP VV	DMOFL VIS	T T		35.58- 20.40-		55.98-
JOYANIA HAWTHORNE XXXX		02 01 2021	TP VV	DMOFL VIS	A A		139.96 87.16		227.12
HASSAN HOSEIN XXXX		03 01 2021	VV	VIS	S		20.40-		20.40-
ONIAS LAURENT XXX		04 01 2021	TP	DMOFL	A		23.72		23.72
NICHOLAS LLEWELLYN XXXX		03 01 2021	TP	DMOFL	T		35.58-		35.58-
EMMANUEL MCNEAL XXXX		03 01 2021	TI VV	DENTL VIS	T T		121.26- 20.40-		141.66-
DELVEN PATTERSON XXXX		02 01 2021	TI VV	DENTL VIS	A A		323.32 54.48		377.80
DARRYL STROUD XXXX		05 01 2021	TP	DMOFL	Y		11.86-		11.86-



Metropolitan Life Insurance Company

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BILL DATE DATE 05 01 2021

TO: CITY OF OPA LOCKA

PRINT DATE: 05 14 2021

FOR ADDITIONAL INFORMATION, SEE REVERSE SIDE

NAME OF INSURED / I.D. NUMBER	INSURED BIRTH MO. - YR.	CLASS & ADJ. DATE	BT CODE	BENEFIT TITLE	FAM. IND.	ADJ. CODE	PREMIUM	VOLUME	TOTAL PREMIUM
ERIC WALTON XXXX		02 01 2021	TI	DENTL	A		161.68		
			VV	VIS	A		27.20		188.88
TERRELL WILLIAMS X		03 01 2021	TP	DMOFL	A		74.70		
			VV	VIS	A		42.06		116.76
VERONICA WILLIAMS XXX		02 01 2021	TI	DENTL	X		161.68-		
			TP	DMOFL	X		47.44		
			VV	VIS	X		27.20		87.04-
									6,597.17
OUTSTANDING DUE AS OF 05/14/2021									5,896.08
***GRAND TOTAL DUE PLEASE PAY THIS AMOUNT ----->									12,493.25

AFTER CHANGES HAVE BEEN RECEIVED AND MADE IN OUR OFFICE,
PREMIUM ADJUSTMENTS WILL BE REFLECTED ON YOUR BILLING STATEMENT.

**MetLife**

Metropolitan Life Insurance Company



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BILL DUE DATE 06-01-2021

TO: CITY OF OPA LOCKA

PRINT DATE: 05 14 2021

FOR ADDITIONAL INFORMATION, SEE REVERSE SIDE

NAME OF INSURED / ID. NUMBER	INSURED BIRTH MO. - YR.	CLASS # ADJ. DATE	BT CODE	BENEFIT TITLE	FAM. IND.	ADJ. CODE	PREMIUM	VOLUME	TOTAL PREMIUM
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SUMMARY TOTALS

		INSUREDS		DEPENDENTS	
TITLE	COUNT	VOLUME	PREMIUM	COUNT	PREMIUM
DENTL	57	0	2,344.36	51	1,886.94
DMOFL	59	0	818.34	35	431.03
VIS	85	0	646.00	73	470.50

*****PLEASE NOTE*****

METLIFE MUST RECEIVE YOUR PREMIUM WITHIN 31 DAYS OF THE BILL DUE DATE
OR YOUR POLICY WILL TERMINATE ACCORDING TO ITS TERMS.

- Checks or money orders should be made payable to Metropolitan Life Insurance Company. Send payment along with the remittance copy of the billing to:

Metropolitan Life Insurance Company
P. O. Box 804466
Kansas City, Missouri 64180-4466

- **ELECTRONIC FUNDS TRANSFER (EFT)** – EFT is an electronic payment option for remittance of the monthly premium, without the processing and postage costs associated with issuing and mailing a check to us each month. To implement EFT, contact your Customer Service Representative at 1 800 ASK 4 MET (1 800 275-4638) to obtain more information and an authorization form.
- **PREMIUMS FOR NEW ENROLLMENTS OR CHANGES** – New enrollments and changes will be billed on the next premium statement if we receive this information from you before the next bill date.

FAMILY INDICATORS

A = Family
B = Member and Spouse
C = Member Only
D = Member and Children
 Spouse is Excluded
E = Spouse and Children
 Member is Excluded
F = Spouse Only
G = Children Only

ADJUSTMENT CODES

A = Member Addition
B = Benefit Record Change
C = Class Change
D = Dependent Change
E = Evidence Change
F = Family Indicator Change
G = Group Generation Change
H = Division Generation Change
I = Reinstatement
J = Substandard Rate Update
K = Reinsurance Change
L = Lapse In Coverage
M = Medical Rate Table Change
N = Non-Medical Rate Table Change
O = Only Manual Adjustments
P = Selected Benefit
Q = Election Change Generation
R = Retirement
S = Change In Benefit Status
T = Termination
U = Elected Units
V = Factor Table Change
W = Other Changes
X = Member Adjustment/Correction
Y = Age Change
Z = Batch Control
\$ = Salary Change
1 = Adjustment Of Elected Volumes
2 = Disability Event Change
3 = Payroll Event Change
4 = Member Key Change
5 = Family Rate Table Change
7 = MX Screen Changes
8 = ME Screen Changes Applied Retroactively,
 Equal To The Member Effective Date

Account #	
Amount Due	4,934.20
Premium Due By	06-01-2021
Coverage	06-01-2021 - 06-30-2021
Reference	4253771032
Bill Date	05-20-2021

VLIFE Policy #	000400208162-00000
LTD Policy #	000010208159-00000
WI Policy #	000010208163-00000
LIFE Policy #	000010208158-00000

Billed Address	
City of Opa Locka	
Kiera Ward	
780 Fisherman Street	
Opa Locka, FL 33054	

Previous Billed Balance	4988.51
Premium Processed	-4988.51
Beginning Balance	0.00
Current Period Premium	4989.20
Current Period Adjustments	-55.00
Current Billed Balance	
Total Amount Due	4934.20

Current Premium

CERT NO.	NAME	VL VOLUME	LFE	AD+D	WI	LTD	VLFE	VAD+D	VS LIFE	VS AD+D	VC LIFE	TOTAL
	Abia, Esin D.		9.33	0.72								10.05
	Achi, Gladys		14.35	1.10								15.45
	Agenor, Ysande		14.35	1.10								15.45
	Alvarado, Hugo A.		14.35	1.10	24.19	27.67						67.31
	Anathan, Robert		7.18	0.55								7.73
	Austin, Arita		14.35	1.10	41.00							56.45
	Bailey, Willie J.	20000	14.35	1.10	18.90		20.20	0.64	10.10	0.32		65.61
	Barnes, Kama		14.35	1.10								15.45
	Bell, Robert A.		14.35	1.10								15.45
	Borrero, Ruben		14.35	1.10	52.21							67.66
	Bosque, German		14.35	1.10								15.45
	Brayton, Andrea		14.35	1.10								15.45
	Britton, Mochan S.	150000	14.35	1.10			43.50	4.80				63.75
	Brown, Tiquella	20000	14.35	1.10	16.73	7.45	1.80	0.64			2.00	44.07
	Bullock, Sherine	150000	14.35	1.10			16.50	4.80			2.00	38.75
	Burke, Alvin		14.35	1.10								15.45
	Bustillo, Iris L.		14.35	1.10		20.55						36.00
	Cadet, Fredrik		14.35	1.10	12.05	3.51						31.01
	Camey, Owen H.		14.35	1.10								15.45
	Charles, Cleford		14.35	1.10								15.45
	Charlot, Venis		14.35	1.10	15.25	40.48						71.18
	Chiverton, Daron L.	20000	14.35	1.10			5.80	0.64				21.89
	Cook, John T.		14.35	1.10	19.11							34.56
	Cuevas, Anyelina A.		14.35	1.10								15.45

Obasi, Ambrose	14 35	1.10	11.28	24.88						51.61
Parfait-Felix, Martha	14 35	1.10								15.45
Parker, Tangelar L.	50000	14 35	1.10	25.75	27.00	1.60	13.50	0.80		84.10
Pate, John	170000	14 35	1.10	41.00	60.66	18.70	5.44	2.00		143.25
Patterson, Delven		14 35	1.10							15.45
Perez, Manuel T.		14 35	1.10							15.45
Perez, Sergio M.		14 35	1.10	13.77						29.22
Petit-frere, Marilyn B.		14 35	1.10							15.45
Phillips, Kathy A.		14 35	1.10							15.45
Pichardo, Olga		7.18	0.55							7.73
Pigatt, Matthew A.		14 35	1.10	3.12	1.39					19.96
Ramlike, Dwayne		14 35	1.10							15.45
Ray, Zonya C.		14 35	1.10	24.03						39.48
Reraud, John R.	150000	14 35	1.10	15.74	25.32	43.50	4.80			104.81
Rivera, Andrew		14 35	1.10							15.45
Robinson, Barbara		14 35	1.10	15.38	33.95					64.78
Rodriguez, Luis M.	50000	14 35	1.10	23.37	51.58	50.50	1.60			142.50
Rodriguez, Nelson		14 35	1.10							15.45
Rogers, Alvin J.	150000	14 35	1.10		27.00	4.80				47.25
Rosero, Jairo	40000	14 35	1.10	10.95	8.28	4.40	1.28			40.36
Saint-Alme, Bradley		14 35	1.10		8.45					23.90
Serrano, Luis	20000	14 35	1.10		47.33	5.80	0.64			69.22
Shipman, Brandon		14 35	1.10							15.45
Simon, Lowrie C.		14 35	1.10	21.98	25.10					62.53
Steel, Michael A.		14 35	1.10							15.45
Swift, Prudence Y.		14 35	1.10	9.84	15.82					41.11
Taylor, Johane H.		14 35	1.10	21.98						37.43
Taylor, John		14 35	1.10							15.45
Thomas, Kenneth		14 35	1.10	16.24	26.11					57.80
Thomas, Yvette		14 35	1.10	11.52						26.97
Thompson, Natalya		14 35	1.10	17.71						33.16
Trigo, Jose A.	20000	14 35	1.10	23.04	61.20	17.20	0.64			117.53
Troupe, Derrick		14 35	1.10							15.45
Vega, Edward		14 35	1.10							15.45
Velman, Ludwin	20000	14 35	1.10	29.44	47.33	5.80	0.64			98.66
Viquez, Arshad		7.18	0.55							7.73
Vital, Kerby		14 35	1.10	17.96	8.01					41.42
Walden, Latrice R.		14 35	1.10		40.57					56.02
Walton, Eric		14 35	1.10							15.45
Ward, Kiera	120000	14 35	1.10	32.80	10.80	3.84	4.50	1.60	2.00	70.99
West, Florence		14 35	1.10							15.45
Wilcox, Wilma F.		14 35	1.10							15.45
Williams, Kakwanzanashaye		14 35	1.10	11.28	8.51					35.24
Williams, Terrell	80000	14 35	1.10		23.20	2.56		2.00		43.21
Williams, Veronica		14 35	1.10							15.45
Witherspoon, Willie		14 35	1.10	15.74	41.79					72.98
Wright, Floriba		14 35	1.10							15.45
Zonide, Nelson		14 35	1.10							15.45
Totals (Lines: 123)	2760000	1,738 52	133.27	1,010.43	1,128.83	753.70	88.32	102.85	9.28	4,989.20

Adjustments



FOR BILLING INQUIRIES:
1-800-656-9323

Bill To:

City of Opa Locka
3400 NW 135th St Bldg B
Opa Locka, FL 33054-4708

BILLING INVOICE

INVOICE DATE	ACCOUNT/MEMBER ID	PERIOD COVERED	DUE DATE	INVOICE NUMBER
06/11/2021		07/01/2021-07/31/2021	07/01/2021	258349
TOTAL CONTRACTS				AMOUNT 119
TOTAL MEMBERS				207
PREVIOUS BALANCE				\$147,406.30
AMOUNT PAID				\$147,406.30
BALANCE FORWARD				\$0.00
TOTAL ADJUSTMENTS				-\$4,023.18
CURRENT PREMIUMS				\$75,890.65
PLEASE PAY THIS AMOUNT				\$71,867.47
*** PLEASE PAY THIS INVOICE IN FULL *** AvMed is a pre-paid health plan, with payments due on the first day of the month for which services are contracted. Any payments, additions, changes in coverage and terminations that are not received by the 5th will be reflected on a subsequent invoice. Please submit all additions via an Employee Enrollment Form and changes via an Employee Status Form to our Enrollment Services Department.				

Please print and separate coupon along the dotted line, and include it with your payment.

AvMed Embrace better health.
AvMed, Inc.
D 860363
Orlando, FL 32886-0363

INVOICE NUMBER	258349
ACCOUNT/MEMBER ID	
PAYMENT DUE DATE	07/01/2021
PAYMENT AMOUNT DUE	\$71,867.47
PLEASE INDICATE AMOUNT PAID	

000000258349 000000AIUA 07012021 00007186747 6 2

Request for Proposal Agent of Record for Employee Benefit Programs

Under Evaluation

30	1480	0	9	2
Planholders	Broadcast to	Supplemental Suppliers	Watchers	Post Bid Viewers

Bid Details

Agency Name	City of Opa-locka
Bid Writer	Sha'mecca Lawson
Bid ID	RFP-21-0629100-0-2021/SL
Bid Type	RFP - Request for Proposal
Broadcast Date	May 30, 2021 12:00am (EDT)
Fiscal Year	2021
Due	Jul 7, 2021 1:00pm (EDT)
Bid Status Text	None

Scope of Work

None

Documents

Download all documents

Filename	Type	File Type	File Size	Date Modified	Status
Addendum-04	Addendum	PDF	4.46 MB	Jun 29, 2021	Complete
Addendum-04	Addendum	PDF	70.32 KB	Jun 29, 2021	Complete
Addendum-03	Addendum	PDF	62.44 KB	Jun 28, 2021	Complete
Addendum-02	Addendum	XLS	58.00 KB	Jun 16, 2021	Complete
Addendum-02	Addendum	PDF	5.04 MB	Jun 16, 2021	Complete
Addendum-01	Addendum	PDF	70.17 KB	Jun 7, 2021	Complete
RFP No. 21-0...	Bid Document / Specifications	PDF	832.72 KB	May 24, 2021	Complete

eBidding Info

Require Suppliers To Enter Bid Yes

[Home](#) > [Bids](#) > Request for Proposal Agent of Record for Employee Benefit Programs

[Update Bid](#) [Award Bid](#)

view Supplier info on Tabulation Sheet Fully Sealed - no information is visible to you until the due date and time.

Required Documents

1. Bid Document
2. Certificate of Insurance
3. W-9 form
4. Drug Free Workplace Certification
5. Non-Collusive Affidavit
6. Sworn Statement on Public Entity Crimes
7. Permits and Licenses

Distribution Info

Bid Bond None

Plan (blueprint) None

eBidding Yes

Distributed By DemandStar

Distribution Method Download and Mail

Distribution Options Bid has no blueprints associated with it

Publications

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Pre-Bid Conference

MANDATORY Tuesday, June 8, 2021 at 10:00 a.m. at Sherbondy Village 215 Perviz Avenue, Opa-locka, FL 33054.

Statistics

Planholders There are 30 Planholders for this bid.

Filtered No

Broadcast List 1480 Suppliers have been notified [Export](#)

Post-Bid Viewers There are 2 Post-Bid viewers

Supplemental Suppliers 0 Supplemental Suppliers

Commodity Code

[001-946-00] FINANCIAL SERVICES

[001-952-00] HUMAN SERVICES

[001-953-00] INSURANCE AND INSURANCE SERVICES, ALL TYPES

[001-958-00] MANAGEMENT AND OPERATION SERVICES

[001-998-00] SALE OF SURPLUS AND OBSOLETE ITEMS

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BROWARD COUNTY

37 cats, 7 cows rescued, and dead animals recovered in animal-abuse cases

BY DEVOUN CETOUTE
dcetoute@miamiherald.com

Sunrise police and several animal-care organizations rescued mistreated animals in separate abuse cases in Broward County: a home with more than 40 dead and live cats, and more than seven abandoned malnourished cows.

The animal-abuse woes began Thursday when officers received a call of malnourished cows in the area of 44th Street and Hiatus Road, police said.

Some of the cows in the area were rescued with the help of the American Society for the Prevention of Cruelty to Animals. Seven

cows will be relocated to Homestead. Sunrise police have been feeding the animals.

Police said Rafael Guevera is connected to the case and had been arrested previously on animal-involved charges in Miami-Dade County.

It is unclear what charges he is facing.

On Saturday, Sunrise officers were called to a "deplorable" home that seemed abandoned, police said. After going inside, officers saw dozens of cats.

With the help of the Humane Society of Broward County, Saving Sage Animal Rescue Foundation and other groups, officers began working to rescue

the animals.

Over the course of four days, 37 cats were found alive and about five were dead. Police said the rescue process was long to ensure the animals' safety.

"We were working under the guidance of the Humane Society who have more expertise in this matter," Sunrise Police Spokesman Luis Fernandez said.

Police planned to continue searching the home for cats. The next step is to search the property's walls.

No information has been given about a possible suspect in the feline case as police continue investigating and focus on rescue efforts.



CITY OF OPA-LOCKA REQUEST FOR PROPOSALS RFP NO: 21-0630100

Comprehensive Parks and Recreation Master Plan

Sealed Proposals for a Comprehensive Parks & Recreation Master Plan will be received by the City of Opa-locka at the Office of the City Clerk, 780 Fisherman St., 4th Floor, Opa-locka, Florida 33054, **Wednesday, June 30, 2021 by 1:00 p.m.** Any RFP Package received after the designated closing time will be returned unopened. The City of Opa-locka will be accepting proposals by mail, however it is your responsibility to submit your proposal by the due date. In addition, proposals may be submitted via www.demandstar.com (e-bid). The address to submit sealed proposals is listed below:

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Joanna Flores, CMC
City Clerk

CLIP-N-SAVE

Denture Problems

Dorone M. Manasse, D.M.D., P.A.

Fred Gelfand, Dental Tech

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RFP NO: 21-0630100

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LEGAL NOTICE
PUBLIC HEARING

COMPREHESIVE PLAN LAND USE MAP AMENDMENT

On Wednesday, June 9th, 2021, at 6:00 P.M. in the 3rd floor Council Chambers of City Hall at 501 Palm Avenue, the Hialeah Planning and Zoning Board, the Local Planning Agency, will hold a Public Hearing on six (6) owner-initiated amendments to the Hialeah Comprehensive Plan, which are Small Scale Amendments in accordance with Section 98-102 of the Code of Ordinances of the City of Hialeah, and Chapters 163.3184 and 163.3187, Florida Statutes.

1	Small Scale Amendment from Kennels to Industrial.	Location: 240 West 28 th Street, Hialeah, Florida Zoned: M-1 (Industrial District)
2	Small Scale Amendment from Industrial to Transit Oriented Development District.	Location: 4800 NW 37 th Avenue, Hialeah, Florida Zoned: M-1 (Industrial District)
3	Small Scale Amendment from Low Density Residential to Medium Density Residential.	Location: 2901 East 5 th Avenue, Hialeah, Florida Zoned: R-1 (One-Family District)
4	Small Scale Amendment from Medium Density Residential to Commercial.	Location: 1179 West 69 th Place, Hialeah, Florida Zoned: R-3-3 (Multiple-Family District)
5	Small Scale Amendment from Medium Density Residential to Commercial.	Location: 1174 West 70 th Place, Hialeah, Florida Zoned: R-3-3 (Multiple-Family District)
6	Small Scale Amendment from Commercial to High Density Residential.	Location: 3090 Palm Avenue, Hialeah, Florida Zoned: C-2 (Liberal Retail Commercial District)

The purpose of this hearing is to give the applicants an opportunity to justify their requests, the Planning Division of the Community Development Department to present a recommendation on the applications and to provide an opportunity for the public to ask questions and make comments regarding the amendments.

Information on the application can be obtained at the Hialeah Planning & Zoning Division, 2nd Floor – Hialeah City Hall, 501 Palm Avenue, or by calling (305) 883-8075 or (305) 883-8008 between 7:30 A.M. – 11:30 A.M. and 12:30 P.M. – 3:30 P.M., Monday through Friday.

AT THE CONCLUSION OF THE ITEM, A RECOMMENDATION FOR APPROVAL OR DENIAL WILL BE MADE AND FORWARDED TO THE HIALEAH CITY COUNCIL FOR CONSIDERATION AT ITS PUBLIC MEETINGS OF JUNE 22ND, 2021 AND JULY 13TH, 2021.

IN ACCORDANCE WITH THE AMERICANS WITH DISABILITIES ACT OF 1990, PERSONS NEEDING A SPECIAL ACCOMMODATION TO PARTICIPATE IN THIS PROCEEDING SHOULD CONTACT THE PLANNING DIVISION BETWEEN 8:00 – 11:30 A.M. AND 12:30 – 4:00 P.M., MONDAY THROUGH FRIDAY, NO LATER THAN SEVEN DAYS PRIOR TO THE PROCEEDING. TELEPHONE (305) 883-8075 FOR ASSISTANCE; IF HEARING IMPAIRED, TELEPHONE THE FLORIDA RELAY SERVICE NUMBERS, (800) 955-8771 (TDD) OR (800) 955-8770 (VOICE), FOR ASSISTANCE.

HIALEAH PLANNING & ZONING DIVISION



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NOTICE BY THE VILLAGE OF PINECREST OF INTENT TO USE THE UNIFORM AD VALOREM METHOD OF COLLECTION OF A NONAD VALOREM ASSESSMENT

Notice is hereby given that the following resolution will be considered by the Pinecrest Village Council at a meeting to be held on Tuesday, June 8, 2021, 6:00 p.m., at the Pinecrest Municipal Center/Council Chamber, 12645 Pinecrest Parkway, Pinecrest, Florida.

A RESOLUTION OF THE VILLAGE OF PINECREST, FLORIDA, PROVIDING FOR THE UNIFORM METHOD OF LEVYING, COLLECTING AND ENFORCING NON-AD VALOREM ASSESSMENTS FOR POTABLE WATER IMPROVEMENTS IN ACCORDANCE WITH THE PROVISIONS OF SECTION 197.3632, F.S. THROUGHOUT THE INCORPORATED AREA OF THE VILLAGE FOR THE FISCAL YEAR BEGINNING ON OCTOBER 1, 2022; STATING A NEED FOR SUCH LEVY; PROVIDING FOR THE MAILING AND TRANSMITTAL OF THIS RESOLUTION; AND PROVIDING FOR AN EFFECTIVE DATE.

The purpose of the public hearing is to consider adoption of the resolution authorizing the Village to use the uniform ad valorem method of collecting non-ad valorem assessments levied by the Village as provided in F.S. 197.3632. Interested parties are invited to appear and be heard. Written comments may also be submitted to the Village Council. Visit www.pinecrest-fl.gov/live for details. Copies of the proposed resolution may be obtained at the Pinecrest Municipal Center, 12645 Pinecrest Parkway, Pinecrest, Florida 33156 or via e-mail by sending a request to clerk@pinecrest-fl.gov.

In accordance with the Americans with Disabilities Act of 1990, all persons who are disabled and who need special accommodations to participate in this meeting because of that disability should contact the Village Clerk at 305-234-2121 not later than two business days prior to such proceeding.

Should any person decide to appeal any decision of the Village Council with respect to any matter to be considered at this meeting, that person shall insure that a verbatim record of the proceedings is made including all testimony and evidence upon which any appeal may be based (F.S. 286.0105).

Guido H. Inguanzo, Jr., CMC
Village Clerk

Publication Dates: May 16th, May 23rd, May 30th, June 6th

www.pinecrest-fl.gov

PAID POLITICAL ADVERTISEMENT

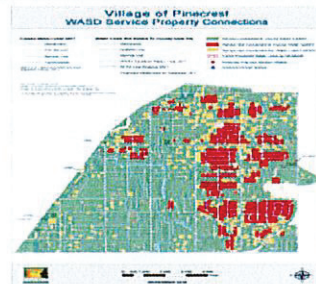
STOP THE 2021 PINECREST

WATER PROJECT!

No More DERM Letters! No More Taxes!

No More Forced Connections!

No WASD Bills!



GO TO CHANGE.ORG TO SIGN THE PETITION:

<https://www.change.org/p/pinecrest-village-council-stop-the-pinecrest-water-projects>

Also, please contact your local and state elected officials and tell them you don't want this latest water project:

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Village Council		(305) 234-2121	council@pinecrest-fl.gov
Mayor	Corradino, Joe	(305) 606-2364	jcorradino@pinecrest-fl.gov
At-Large	Abbott, Katie	(646) 541-7339	kabbott@pinecrest-fl.gov
1	Hochkammer, Anna	(305) 335-7555	ahochkammer@pinecrest-fl.gov
2	Kraft, Doug	(305) 812-6837	dkraft@pinecrest-fl.gov
3	Del Prado, Shannon	(305) 975-8811	sdelprado@pinecrest-fl.gov
Miami-Dade County Commission			
7	Regalado, Raquel	(305) 375-5680	district7@miamidade.gov
Florida State Legislature			
115	Aloupis, Vance	(305) 270-6530	vance.aloupis@mvlhouserep.gov
37	Garcia, Ileana	(305) 442-6841	garcia.ileana@fsenate.gov
Florida Governor			
	DeSantis, Ron	(850) 717-9337	GovernorRon.Desantis@eog.mylflorida.com

Paid for by Citizens Against Forced Water Connections (305-668-8532)



CITY OF OPA-LOCKA
REQUEST FOR PROPOSALS
RFP NO: 21-0629100

Agent of Record for Employee Benefit Programs

Sealed Proposals for Agent of Record for Employee Benefit Programs will be received by the City of Opa-locka at the Office of the City Clerk, 780 Fisherman St., 4th Floor, Opa-locka, Florida 33054, **Tuesday, June 29, 2021 by 1:00 p.m.** Any RFP Package received after the designated closing time will be returned unopened. The City of Opa-locka will be accepting proposals by mail, however it is your responsibility to submit your proposal by the due date. In addition, proposals may be submitted via www.demandstar.com (e-bid). The address to submit sealed proposals is listed below:

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Proposers desiring information for use in preparing proposals may obtain a set of such documents by visiting the City's website at www.opalockafl.gov or www.demandstar.com.

The City reserves the right to accept or reject any and all proposals and to waive any technicalities or irregularities therein. The City further reserves the right to award the contract to that proposer whose proposal best complies with the **RFP NO: 21-0629100** requirements. Proposers may not withdraw their proposal for a period of ninety (90) days from the date set for the opening thereof.

A Mandatory pre-bid meeting will be held on **Tuesday, June 8, 2021 at 10:00 a.m.** at Sherbondy Village, 215 Perviz Avenue, Opa-locka, FL 33054.

Joanna Flores, CMC
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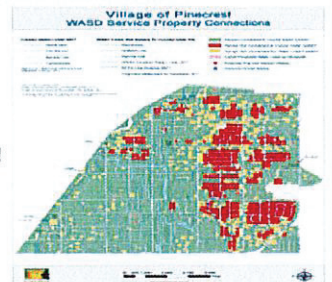
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Miami-Dade County Commission			
7	Regalado, Raquel	(305) 375-5680	district7@miamidade.gov
Florida State Legislature			
115	Aloupis, Vance	(305) 270-6530	vance.aloupis@myfloridahouse.gov
37	Garcia, Ileana	(305) 442-6841	garcia.ileana@flsenate.gov
Florida Governor			
	DeSantis, Ron	(850) 717-9337	GovernorRon.Desantis@eoq.myflorida.com

Paid for by Citizens Against Forced Water Connections (305-668-8532)

MIAMI-DADE COUNTY

'Debtors' prison': Night court, Zoom could help people with suspended licenses

BY DOUGLAS HANKS
dhanks@miamiherald.com

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them to get a fresh start."

In Miami-Dade, more than 630,000 people have suspended licenses, tied to about 1.3 million open court cases, according to statistics provided by Leifman. That means more than a third of Miami-Dade's drivers have suspended licenses. Most were suspended for unpaid fines that trace back to a ticket for something other than dangerous driving, such as failing to present an insurance card during a traffic stop, a parking citation or failing to pay a toll.

The new task force will look at the cycle generating a cascade of suspensions — where county debt



Judge Steve Leifman

collectors tack on 40 percent surcharges on unpaid fines and many violators keep driving while suspended in order to remain employed.

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Florida law also allows 40 percent fees by collection agencies the local court systems hire to collect unpaid fines.

"If you have money, it's almost certainly the case you've never had a license suspended for more than five or six years," Harris Levine, a partner at Ker-

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Ker-twang cited data from the Fines & Fees Justice Center showing that in 2017 more than 250,000 suspension notices went out in Miami-Dade, but only 2,232 were connected to what the non-profit considers "dangerous driving," such as reckless operation of a vehicle.

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CITY OF OPA-LOCKA
AGENT OF RECORD FOR EMPLOYEE BENEFITS AGREEMENT

THIS IS AN AGREEMENT, dated the ____ day of _____, 2022, between:

THE CITY OF OPA-LOCKA, a Florida municipal corporation,
hereinafter "CITY"

and

SAPOZNIK INSURANCE & ASSOCIATES, LLC, a Florida Limited
Liability Company, hereinafter "CONTRACTOR."

WITNESSETH:

In consideration of the mutual terms and conditions, promises, covenants, and payments hereinafter set forth, CITY and CONTRACTOR agree as follows:

ARTICLE 1
PREAMBLE

In order to establish the background, context and form of reference for this Agreement and to generally express the objectives, and intentions, of the respective parties herein, the following statements, representations and explanations shall be accepted as predicates for the undertakings and commitments included within the provisions which follow and may be relied upon by the parties as essential elements of the mutual considerations upon which this Agreement is based.

1.1 CITY is in need of a CONTRACTOR to provide the services for Agent of Record for Employee Benefits.

1.2 CITY has a strong commitment to provide high quality Insurance and Benefits to the CITY employees.

1.3 CITY issued RFP NO. 21-0629100 ("RFP"), seeking a professional company with the knowledge and ability to perform the services sought.

1.4 At its meeting of _____, CITY selected CONTRACTOR to perform the services needed for Agent of Record for Employee Benefits.

1.5 CONTRACTOR's firm shall furnish all services, work, labor, equipment, and materials necessary to obtaining competitive market quotes and will provide enrollment and administrative support services for a wide range of employer group and individual employee benefits for the City of Opa-locka.

ARTICLE 2
SCOPE OF WORK

2.1 CONTRACTOR shall furnish all the materials, tools, supplies, and labor necessary to perform all of the work described in the Request for Qualifications RFP 21-0629100, a copy of which is attached hereto and specifically made a part of this Agreement as Exhibit "A", and the Scope of Services attached hereto as Exhibit "B".

2.2 CONTRACTOR shall abide by all specifications outlined in RFP 21-0629100.

2.3 CONTRACTOR hereby represents to CITY, with full knowledge that CITY is relying upon these representations when entering into this Agreement with CONTRACTOR, and that CONTRACTOR has the professional expertise, experience and manpower to perform the services to be provided by CONTRACTOR as set forth in CONTRACTOR's response to RFP.

2.4 CONTRACTOR assumes professional and technical responsibility for performance of its services to be provided hereunder in accordance with applicable recognized professional standards and relevant Florida Statutes.

ARTICLE 3
COMMENCEMENT OF SERVICES

3.1 The CONTRACTOR shall commence work as directed by CITY upon the effective date this Agreement is executed by both parties.

ARTICLE 4
COMPENSATION

4.1 Sapoznik Insurance, A World Company will contract services as listed below at a commission rate:

- Medical: 4% commission rate
- Dental: 5% commission rate
- Vision: 5% commission rate
- Short & long term disability: 10% commission rate
- Supplemental: 10% commission rate

4.2 CONTRACTOR shall be solely responsible for and shall provide for the payment of workers compensation insurance coverage and premium, and all other insurance pursuant to Article 5 below, withholding taxes, FICA, pension and profit-sharing contributions, retirement contributions, if any, all remunerations; all labor contract compliance, and all other charges, fees, permits and expenses associated with the employment of such personnel provided by CONTRACTOR hereunder. CITY shall bear no responsibility for any such charge, fees, permits or expenses associated with the employment of such personnel by CONTRACTOR.

4.3 Payment to CONTRACTOR for all tasks and charges under this Agreement shall be based on the following conditions:

- A. Disbursements. There are no reimbursable expenses associated with this Agreement.

- B. Payment Schedule. Invoices received from CONTRACTOR pursuant to this Agreement will be reviewed by the appropriate financial staff. If services have been rendered in conformity with the Agreement, the invoice will be sent to the City of Opa-locka's Finance Department for payment and may need to be subsequently approved by the State of Florida.
- C. Availability of Funds. CITY's performance and obligation to pay under this Agreement is contingent upon an annual appropriation from the CITY.

4.4 The making and acceptance of the final payment shall constitute a waiver of all claims by the CITY. It shall also constitute a waiver of all claims by the CONTRACTOR, except those previously made and still unsettled.

ARTICLE 5

CONTRACTOR'S LIABILITY INSURANCE

5.1 The CONTRACTOR shall not commence work under this contract until it has obtained all insurance required under this paragraph and such insurance has been approved by the CITY nor shall the CONTRACTOR allow any Subcontractor to commence work on his sub-contract until all similar such insurance required of the subcontractor has been obtained and approved.

5.2 Certificates of insurance, reflecting evidence of the required insurance, shall be filed with the CITY prior to the commencement of the work. These Certificates shall contain a provision that coverage afforded under these policies will not be canceled until at least thirty days (30) prior written notice has been given to the CITY. Policies shall be issued by companies authorized to do business under the laws of the State of Florida.

5.3 Insurance shall be in force until all work required to be performed under the terms of the Contract is satisfactorily completed as evidenced by the formal acceptance by the CITY. In the event the insurance certificate provided indicates that the insurance shall terminate and lapse during the period of this contract, then in that event, the CONTRACTOR shall furnish, at least thirty (30) days prior to the expiration of the date of such insurance, a renewed certificate of insurance as proof that equal and like coverage for the balance of the period of the contract and extension thereunder is in effect. The CONTRACTOR shall not continue to work pursuant to this contract unless all required insurance remains in full force and effect.

5.4 Comprehensive General Liability insurance to cover bodily injury liability and property damage liability with minimum limits of One Million Dollars (\$1,000,000.00) per occurrences. Exposures to be covered are:

- Premises and Operation

- Products/Completed Operations
- Broad Form Property Damages
- Broad Form Contractual Coverage applicable to this specific Agreement, including any hold harmless and/or indemnification agreement.
- Personal Injury Coverage with Employee and Contractual Exclusions removed, with minimum limits of coverage equal to those required for Bodily Injury Liability and Property Damage Liability.

Business Automobile Liability with minimum limits of One Million Dollars (\$1,000,000.00) per occurrence combined single limit for Bodily Injury Liability and Property Damage Liability. Coverage must be afforded on a form no more restrictive than the latest edition of the Business Automobile Liability policy, without restrictive endorsements, and must include:

- Owned vehicles
- Hired and Non-Owned Vehicles
- Employers' Non-Ownership.

5.5 The CONTRACTOR shall hold the CITY, the City of Opa-Locka their agents, and employees, harmless on account of claims for damages to persons, property or premises arising out of the operations to complete this Agreement and name the CITY as an additional insured under their policy.

5.6 The CITY reserves the right to require any other insurance coverage it deems necessary depending upon the exposures.

ARTICLE 6 PROTECTION OF PROPERTY

6.1 At all times during the performance of this Contract, the CONTRACTOR shall protect the CITY's property and properties adjoining the Project site from all damage whatsoever on account of the work being carried on pursuant to this Agreement.

ARTICLE 7 CONTRACTOR'S INDEMNIFICATION

7.1 The CONTRACTOR agrees to release the CITY from and against any and all liability and responsibility in connection with the above-mentioned matters. The CONTRACTOR further agrees not to sue or seek any money or damages from CITY in connection with the above-mentioned matters, except in the event that the CITY fails to pay to CONTRACTOR the fees and costs as provided for in Article 4 herein.

7.2 The CONTRACTOR agrees to indemnify and hold harmless the CITY, its trustees, elected and appointed officers, agents, servants and employees, from and against any and all claims, demands, or causes of action of whatsoever kind or nature, and the resulting losses, costs, expenses, reasonable attorneys' fees, liabilities, damages, orders, judgments, or decrees, sustained by the CITY or any third party arising out of, or by reason of, or resulting from the

CONTRACTOR's negligent acts, errors, or omissions.

7.3 If a court of competent jurisdiction holds the CITY liable for certain tortuous acts of its agents, officers, or employees, such liability shall be limited to the extent and limit provided in 768.28, Florida Statutes. This provision shall not be construed as a waiver of any right or defense that the CITY may possess. The CITY specifically reserves all rights as against all claims that may be brought.

ARTICLE 8 INDEPENDENT CONTRACTOR

8.1 This Agreement does not create an employee/employer relationship between the parties. It is the intent of the parties that the CONTRACTOR is an independent contractor under this Agreement and not the CITY's employee for all purposes, including but not limited to, the application of the Fair Labor Standards Act minimum wage and overtime payments, Federal Insurance Contribution Act, the Social Security Act, the Federal Unemployment Tax Act, the provisions of the Internal Revenue Code, the State Workers Compensation Act, and the State unemployment insurance law. The CONTRACTOR shall retain sole and absolute discretion in the judgment of the manner and means of carrying out the CONTRACTOR's activities and responsibilities hereunder provided. This Agreement shall not be construed as creating any joint employment relationship between the CONTRACTOR and the CITY and the CITY will not be liable for any obligation incurred by CONTRACTOR, including but not limited to unpaid minimum wages and/or overtime premiums.

ARTICLE 9 CONTRACT BOND

9.1 The bond requirements for this Agreement shall be as follows:

NOT APPLICABLE

ARTICLE 10 CHANGES TO SCOPE OF WORK AND ADDITIONAL WORK

10.1 CITY or CONTRACTOR may request changes that would increase, decrease or otherwise modify the Scope of Services/Basic Services to be provided under this Agreement as described in Article 2 of this Agreement. Such changes or additional services must be in accordance with a written amendment, executed by the parties hereto, with the same formality and with equality and dignity prior to any deviation from the terms of this Agreement, including the initiation of any additional or extra work. Each amendment shall at a minimum include the following information on each project:

PROJECT NAME
PROJECT DESCRIPTION
ESTIMATED PROJECT COST
ESTIMATED COST FOR ADDITION OR CHANGE TO PROJECT CONTRACT
ESTIMATED PROJECT COMPLETION DATE

10.2 In no event will the CONTRACTOR be compensated for any work which has not been described in a separate written agreement executed by the parties hereto.

ARTICLE 11 TERM AND TERMINATION

11.1 This Agreement shall commence upon execution of this Agreement and shall be effective for one year with two one-year renewals upon agreement of the parties and subject to City Commission approval.

11.2 This Agreement may be terminated by either party for cause, or the CITY for convenience, upon thirty (30) days written notice by the CITY to CONTRACTOR in which event the CONTRACTOR shall be paid its compensation for services performed to termination date. In the event that the CONTRACTOR abandons this Agreement or causes it to be terminated, he shall indemnify the CITY against any loss pertaining to this termination up to a maximum of the full contracted fee amount. All finished or unfinished documents, data, studies, plans, surveys, and reports prepared by CONTRACTOR shall become the property of CITY and shall be delivered by CONTRACTOR to CITY.

ARTICLE 12 CONTRACT DOCUMENTS

12.1 CONTRACTOR and CITY hereby agree that the following Specification and Contract Documents, which are attached hereto and made a part thereof, are fully incorporated herein and made a part of this Agreement, as if written herein word for word: this Agreement; RFP 21-0629100, Exhibit "A", and the Scope of Services, attached hereto as Exhibit "B".

ARTICLE 13 MISCELLANEOUS

13.1 Legal Representation. It is acknowledged that each party to this Agreement had the opportunity to be represented by counsel in the preparation of this Agreement and, accordingly, the rule that a contract shall be interpreted strictly against the party preparing same shall not apply due to the joint contribution of both parties.

13.2 Assignments. This Agreement, or any interest herein, shall not be assigned, transferred or otherwise encumbered, under any circumstances, by CONTRACTOR without the prior written consent of CITY. For purposes of this Agreement, any change of ownership of CONTRACTOR shall constitute an assignment which requires CITY approval. However, this Agreement shall run to the CITY and its successors and assigns.

13.3 Records. CONTRACTOR shall keep books and records and require any and all subcontractors to keep books and records as may be necessary in order to record complete and correct entries as to personnel hours charged to this engagement, and any expenses for which CONTRACTOR expects to be reimbursed, if applicable. Such books and records will

be available at all reasonable times for examination and audit by CITY and shall be kept for a period of three (3) years after the completion of all work to be performed pursuant to this Agreement. Incomplete or incorrect entries in such books and records will be grounds for disallowance by CITY of any fees or expenses based upon such entries.

CITY is a public agency subject to Chapter 119, Florida Statutes. To the extent CONTRACTOR is acting on behalf of CITY pursuant to Section 119.0701, Florida Statutes, CONTRACTOR shall:

- a. Keep and maintain public records that ordinarily and necessarily would be required to be kept and maintained by CITY were CITY performing the services under this agreement;
- b. Provide the public with access to such public records on the same terms and conditions that the County would provide the records and at a cost that does not exceed that provided in Chapter 119, Florida Statutes, or as otherwise provided by law;
- c. Ensure that public records that are exempt or that are confidential and exempt from public record requirements are not disclosed except as authorized by law; and
- d. Meet all requirements for retaining public records and transfer to CITY, at no cost, all public records in possession of the CONTRACTOR upon termination of this Agreement and destroy any duplicate public records that are exempt or confidential and exempt. All records stored electronically must be provided to the CITY.

13.4 Ownership of Documents. Reports, surveys, plans, studies and other data provided in connection with this Agreement are and shall remain the property of CITY.

13.5 No Contingent Fees. CONTRACTOR warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the CONTRACTOR, to solicit or secure this Agreement, and that it has not paid or agreed to pay any person, company, corporation, individual or firm, other than a bona fide employee working solely for CONTRACTOR, any fee, commission, percentage, gift, or other consideration contingent upon or resulting from the award or making of this Agreement. For the breach or violation of this provision, the CITY shall have the right to terminate the Agreement without liability at its discretion, to deduct from the contract price, or otherwise recover the full amount of such fee, commission, percentage, gift or consideration.

13.6 Notice. Whenever any party desires to give notice unto any other party, it must be given by written notice, sent by registered United States mail or national delivery service with verified confirmation. If by mail, with return receipt requested, addressed to the party for whom it is intended and the remaining party, at the places last specified, and the places for giving of notice shall remain such until they shall have been changed by written notice in compliance with the provisions of this section. For the present, the CONTRACTOR and the CITY designate the following as the respective places for giving of notice:

CITY: Darvin Williams, Interim City Manager
City of Opa-locka Municipal Complex
780 Fisherman Street, Fourth Floor
Opa-locka, FL 33054

Copy To: Burnadette Norris-Weeks, City Attorney
Burnadette Norris-Weeks, P.A.
401 North Avenue of the Arts
Fort Lauderdale, Florida 33311

Contractor: Rachel Sapoznik
1100 NE 163rd Street
North Miami Beach, FL 33162

13.7 Binding Authority. Each person signing this Agreement on behalf of either party individually warrants that he or she has full legal power to execute this Agreement on behalf of the party for whom he or she is signing, and to bind and obligate such party with respect to all provisions contained in this Agreement.

13.8 Exhibits. Each Exhibit referred to in this Agreement forms an essential part of this Agreement. The exhibits if not physically attached should be treated as part of this Agreement and are incorporated herein by reference.

13.9 Headings. Headings herein are for convenience of reference only and shall not be considered on any interpretation of this Agreement.

13.10 Severability. If any provision of this Agreement or application thereof to any person or situation shall, to any extent, be held invalid or unenforceable, the remainder of this Agreement, and the application of such provisions to persons or situations other than those as to which it shall have been held invalid or unenforceable shall not be affected thereby, and shall continue in full force and effect, and be enforced to the fullest extent permitted by law.

13.11 Governing Law. This Agreement shall be governed by the laws of the State of Florida with venue lying in Miami-Dade County, Florida.

13.12 Disputes. Any claim, objection, or dispute arising out of the terms of this Agreement shall be litigated in the Eleventh Judicial Circuit Court in and for Miami-Dade County.

13.13 Attorney's Fees. To the extent authorized by law, in the event that either party brings suit for enforcement of this Agreement, the prevailing party shall be entitled to attorney's fees and court costs in addition to any other remedy afforded by law.

13.14 Extent of Agreement. This Agreement together with Contract Documents, attached as an Exhibit hereto, as amended herein above represents the entire and integrated agreement between the CITY and the CONTRACTOR and supersedes all prior negotiations, representations or agreements, either written or oral.

13.15 Waiver. Failure of the CITY to insist upon strict performance of any provision or condition of this Agreement, or to execute any right therein contained, shall not be construed as a waiver or relinquishment for the future of any such provision, condition, or right, but the same shall remain in full force and effect.

IN WITNESS OF THE FOREGOING, the parties have set their hands and seals the day and year first written above.

City of Opa-Locka

ATTEST:

Joanna Flores
City Clerk

BY:

Darvin Williams
Interim City Manager

APPROVED AS TO FORM
AND LEGAL SUFFICIENCY:

Burnadette Norris-Weeks, City Attorney

CONTRACTOR

WITNESSES:

BY: _____

Rachel Sapoznik, President
Sapoznik Insurance, A World
Company

ATTEST:

SECRETARY

STATE OF FLORIDA)
) SS:
COUNTY OF MIAMI-DADE)

BEFORE ME, an officer duly authorized by law to administer oaths and take acknowledgments, personally appeared _____ as _____, of a Florida corporation, and acknowledged executed the foregoing Agreement as the proper official of _____, for the use and purposes mentioned in it and affixed the official seal of the corporation, and that the instrument is the act and deed of that corporation.

IN WITNESS OF THE FOREGOING, I have set my hand and official seal at in the State and County aforesaid on this _____ day of _____, 2022.

NOTARY PUBLIC

My Commission Expires:

EXHIBIT "A"
RFP 21-0629100 ("RFP")

City of Opa-locka



RFP NO: 21-0629100

REQUEST FOR PROPOSAL (RFP)

AGENT OF RECORD

FOR

EMPLOYEE BENEFIT PROGRAMS



CITY OF OPA-LOCKA
AGENT OF RECORD
FOR EMPLOYEE BENEFIT PROGRAMS

RFP NO. 21-0629100

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CITYOFOPA-LOCKA

REQUEST FOR PROPOSALS

RFP NO: 21-0629100

Agent of Record for Employee Benefit Programs

Sealed Proposals for Agent of Record for Employee Benefit Programs will be received by the City of Opa-locka at the Office of the City Clerk, 780 Fisherman St, 4th Floor, Opa-locka, Florida 33054, Tuesday, June 29, 2021 by 1:00 p.m. Any RFP Package received after the designated closing time will be returned unopened. The City of Opa-locka will be accepting proposals by mail, however it is your responsibility to submit your proposal by the due date. In addition, proposals may be submitted via www.demandstar.com (e-bid). The address to submit sealed proposals is listed below:

CITY OF OPA-LOCKA
Office of the City Clerk
780 Fisherman Street, 4th Floor
Opa-locka, Florida 33054

An original and six (6) copies for a total of seven (7) plus 1 copy of the Proposal package on USB Flash Drive in PDF format shall be submitted in sealed envelopes/packages addressed to the City Clerk, City of Opa-locka, Florida, and marked RFP for Agent of Record for Employee Benefit Programs.

Proposers desiring information for use in preparing proposals may obtain a set of such documents by visiting the City's website at www.opalockafl.gov or www.demandstar.com.

The City reserves the right to accept or reject any and all proposals and to waive any technicalities or irregularities therein. The City further reserves the right to award the contract to that proposer whose proposal best complies with the **RFP NO: 21-0629100** requirements. Proposers may not withdraw their proposal for a period of ninety (90) days from the date set for the opening thereof.

A Mandatory pre-bid meeting will be held on **Tuesday, June 8, 2021 at 10:00 a.m.** at Sherbondy Village, 215 Perviz Avenue, Opa-locka, FL 33054.

City Clerk
Joanna Flores, CMC



CITY OF OPA-LOCKA

RFP NO. 21-0629100

AGENT OF RECORD FOR EMPLOYEE BENEFIT PROGRAMS

PART I

PROPOSAL GUIDELINES

1-1. Introduction: The City of Opa-locka is requesting proposals from qualified professional consultants to provide Agent of Record for Employee Benefit services for the City of Opa-locka.

1-2. Proposal Submission and Withdrawal: The City of Opa-locka will be accepting proposals by mail, however it is your responsibility to submit your proposal by the due date. In addition, proposals may be submitted via www.demandstar.com (e-bid). The City must receive all proposals by 1:00pm on Tuesday, June 29, 2021. The address to submit sealed proposals is listed below:

CITY OF OPA-LOCKA
Office of the City Clerk
780 Fisherman Street, 4th Floor
Opa-locka, Florida 33054

To facilitate processing, please clearly mark the outside of the proposal package as follows: RFP NO. 21-0629100 – Agent of Record for Employee Benefit Program. This package shall also include the Proposer's return address.

Proposers may withdraw their proposals by notifying the City in writing at any time prior to the deadline for proposal submittal. After the deadline, the proposal will constitute an irrevocable offer, for a period of 90 days. Once opened, proposals become a record of the CITY and will not be returned to the Proposer.

The City cautions proposers to assure actual delivery of mailed or hand-delivered proposals directly to the City Clerk's Office at 780 Fisherman Street, 4th Floor, Opa-locka, Florida 33054 prior to the deadline set for receiving proposals. Telephone confirmation of timely receipt of the proposal may be made by calling (305) 688-4611 before proposal closing time. Any proposal received after the established deadline will not be considered and will be returned unopened to the Proposer(s).

1-3. Number of Copies: Proposers shall submit an original and six (6) copies (a total of 7) plus one copy on CD in PDF format of the proposal in a sealed, opaque package marked as noted above. The Proposer will be responsible for timely delivery, whether by personal delivery, US Mail or any other delivery medium.

1-4. Development Costs: Neither the City nor its representatives shall be liable for any expenses incurred in connection with preparation of a response to this Request for Proposal. Proposers should prepare their proposals simply and economically, providing a straightforward and concise

description of the Proposer's ability to meet the requirements of the RFP.

1-5. Inquiries: The City Clerk will receive written requests for clarification concerning the meaning or interpretations of the RFP, until eight (8) days prior to the submittal date. City personnel are authorized only to direct the attention of prospective Proposers to various portions of the RFP so that they may read and interpret such for themselves. No employee of the City is authorized to interpret any portion of this RFP or give information as to the requirements of the RFP in addition to what is contained in the written RFP document.

1-6. Addendum: The City may record its response to inquiries and any supplemental instructions in the form of written addenda. The CITY may mail written addenda up to three (3) calendar days before the date fixed for receiving the proposals. Proposers shall contact the City to ascertain whether any addenda have been issued. Failure to do so could result in an unresponsive proposal. Any oral explanation given before the RFP opening will not be binding.

All Proposers are expected to carefully examine the proposal documents. Any ambiguities or inconsistencies should be brought to the attention of the City's Purchasing Agent through written communication prior to the opening of the proposals.

1-7. Contract Awards: The City anticipates entering into an Agreement with the Proposer who submits the proposal judged by the City to be most advantageous.

The Proposer understands that this RFP does not constitute an offer or an Agreement with the Proposer. An offer or Agreement shall not be deemed to exist and is not binding until proposals are reviewed, accepted by appointed staff, the best proposal has been identified, approved by the appropriate level of authority within the City and executed by all parties. The City anticipates that the final Agreement will be in substantial conformance with this sample Agreement; nevertheless, Proposers are advised that any Agreement may result from the RFP may deviate from the Sample Agreement.

The City reserves the right to reject all proposals, to abandon the project and/or to solicit and re-advertise for other proposals.

1-8. Contractual Agreement: This RFP and Consultant/Contractor proposal shall be included and incorporated in the final award. The order of contractual precedence will be the Contract or Agreement document, original Terms and Conditions, and Proposer response. Any and all legal action necessary to enforce the award will be held in Miami-Dade County and the contractual obligations will be interpreted according to the laws of Florida. Any additional contract or agreement requested for consideration by the Proposer must be attached and enclosed as part of the proposal.

1-9. Selection Process: The proposals will be evaluated and assigned points. The firm with the highest number of points will be ranked first; however, nothing herein will prevent the City from assigning work to any firm deemed responsive and responsible.

The City reserves the right to further negotiate any proposal, including price, with the highest rated Proposer. If an agreement cannot be reached with the highest rated Proposer, the City reserves the right to negotiate and recommend award to the next highest Proposer or subsequent Proposers until an agreement is reached.

1-10. Public Records: Upon award recommendation or ten (10) days after opening, whichever occurs first, proposals become “public records” and shall be subject to public disclosure consistent with Chapter 119 Florida Statutes. Proposers must invoke the exemptions to disclosure provided by law in the response to the RFP, and must identify the data or other materials to be protected, and must state the reasons why such exclusion from public disclosure is necessary. Document files may be examined, during normal working hours.

1-11. News Releases: The Proposer shall obtain the prior approval of the City Manager’s Office of all news releases or other publicity pertaining to this RFP or the service, study or project to which it relates.

1-12. Insurance: The awarded Proposer(s) shall maintain insurance coverage reflecting at least the minimum amounts and conditions specified herein. In the event the Proposer is a governmental entity or a self-insured organization, different insurance requirements may apply. Misrepresentation of any material fact, whether intentional or not, regarding the Proposers’ insurance coverage, policies or capabilities may be grounds for rejection of the proposal and rescission of any ensuing Agreement.

1. Evidence of General Liability coverage with limits not less than \$1,000,000 per Occurrence/ \$2,000,000 Aggregate (Including Policy Number and Policy Period);
2. Evidence of Auto Liability coverage with limits not less than \$1,000,000 per Occurrence/\$1,000,000 Aggregate (Including Policy Number and Policy Period);
3. Evidence of Workers’ Compensation coverage with statutory limits and Employer’s Liability coverage with limits not less than \$100,000 (Including Policy Number and Policy Period);
4. The City listed as an additional insured (this may be specifically limited to the specific job(s) the contractor will be performing);
5. Minimum 30-day written notice of cancellation.

1-13. Licenses: Proposers, both corporate and individual, must be fully licensed and certified in the State of Florida at the time of RFP submittal. The proposal of any Proposer who is not fully licensed and certified shall be rejected.

1-14. Public Entity Crimes: Award will not be made to any person or affiliate identified on the Department of Management Services’ “Convicted Vendor List”. This list is defined as consisting of persons and affiliates who are disqualified from public contracting and purchasing process because they have been found guilty of a public entity crime. No public entity shall award any contract to, or transact any business in excess of the threshold amount provided in Section 287.017 Florida Statutes for Category Two (currently \$25,000) with any person or affiliated on the “Convicted Vendor List” for a period of thirty-six (36) months from the date that person or affiliate was placed on the “Convicted Vendor List” unless that person or affiliate has been removed from the list. By signing and submitting the RFP proposal forms, Proposer attests that they have not been placed on the “Convicted Vendor List”.

1-15. Code Of Ethics: If any Proposer violates or is a party to a violation of the code of ethics of the City of Opa-locka or the State of Florida with respect to this proposal, such Proposer may be disqualified from performing the work described in this proposal or from furnishing the goods or services for which the proposal is submitted and shall be further disqualified from submitting any future proposals for work, goods or services for the City of Opa-locka.

1-16. Drug-Free Workplace: Preference shall be given to businesses with Drug-Free Work Place (DFW) programs. Whenever two or more proposals which are equal with respect to price, quality, and service are received by the City for the procurement of commodities or contractual services, a proposal received from a business that completes the attached DFW form certifying that it is a DFW shall be given preference in the award process.

1-17. Permits and Taxes: The Proposer shall procure all permits, pay all charges, fees, and taxes, and give all notices necessary and incidental to the due and lawful prosecution of the work.

1-18. Protests: Protests of the plans, specifications, and other requirements of the request for proposal and bids must be received in writing by the City Clerk's Office at least ten (10) working days prior to the scheduled bid opening. A detailed explanation of the reason for the protest must be included. Protests of the award or intended award of the bid or contract must be in writing and received in the City Clerk's Office within seven (7) working days of the notice of award. A detailed explanation of the protest must be included.

1-19. Termination for Convenience: A contract may be terminated in whole or in part by the City at any time and for any reason in accordance with this clause whenever the City shall determine that such termination is in the best interest of the City. Any such termination shall be effected by the delivery to the contractor at least five (5) working days before the effective date of a Notice of Termination specifying the extent to which performance shall be terminated and the date upon which termination becomes effective. An equitable adjustment in the contract price shall be made for the completed service, but no amount shall be allowed for anticipated profit on unperformed services.

PART II

NATURE OF SERVICES REQUIRED

2-1 PURPOSE AND SCOPE OF WORK

The City of Opa-locka seeks proposals from qualified firms to provide Brokerage and Consulting Services for the City's employee benefit services. The successful Proposer will obtain competitive market quotes and will provide enrollment and administrative support services for a wide range of employer group and individual employee benefits as further provided herein.

The City has approximately 248 employees and retirees participating in the benefit plans.

The benefit plans should include the following, but is not limited to:

- Health Insurance
- Dental Insurance
- Life Insurance
- Long Term Disability
- Short Term Disability
- Vision
- Voluntary Benefits Services
- Serve as the City's Broker of Record/Consultant and provide such brokerage services to the Employer to ensure comprehensive and cost-effective benefits are included in the City's benefit plans for selection by the City's eligible employee and retirees.
- Present plan design recommendations that support the City's benefits strategies and position the Employer to comply with Federal, State and other regulatory requirements each year.
- Administer the City's health and welfare plans, including setting reserves, reporting experience and projecting funding levels when applicable.
- Provide ongoing advice on ERISA, COBRA, FMLA, and HIPAA reporting obligations, and other laws and regulations affecting the City's benefit plans as it relates to the insurance products within this RFP.
- Provide comprehensive services (traditional and web-based) necessary to enroll current plan designs, plan modifications and consumer education.
- Provide comprehensive services necessary to serve Voluntary Benefits, including enrollment support and election reconciliation.
- Provide a call center with representatives to respond to City employees and retirees.
- Shall agree that all data exchanged between the selected Proposer and the Employer or prospective customers belongs to the Employer and shall be accessible at any time during the life of the contract for no additional fee.
- The Proposer must provide a benefits administration technology platform to be accessible year-round for new hire enrollment and change in status elections of benefits.
- Provide technical assistance to reduce the overall cost of providing these benefits through a variety of means including developing effective negotiation strategies to expeditiously reduce the absolute cost of health insurance benefits.
- Solicit and negotiate annual renewal of existing coverage including soliciting multiple or alternative proposal coverage.
- A comprehensive summary of responsive quotes from insurance carriers will be presented to the City Manager.
- Respond to all employee issues and questions in a timely manner regarding their benefits.
- Provide City with dedicated agents for any assistance needed.
- Provide the City with support for the wellness program.

- Support the City in organizing and coordinating two (2) employee wellness fairs annually.
- Assist the City in the evaluation and implementation of a wellness and disease management program and measure the effectiveness of the program.
- Provide a program for ACA Tracking and 1095 reporting, which includes mailing out forms.
- Identify claim trends and anomalies in a timely manner and prepare recommendations to the City on actions to be taken, if any.
- Review, process and administer all employee claim issues.
- Review historical claims experience, demographic data trends and plans performance from a financial prospective.
- Coordinate and participate in the implementation and enrollment process and employee meetings.
- Assist in the review and or creation of enrollment materials to enhance the overall perceived value of the benefits and compensation.
- Coordination of annual benefits fair at no cost to the City.
- Preparation of insurance applications, compile and format support information needed and requested by insurance company underwriters.
- Compile and maintain historical underwriting information. Provide copies of this information to the City.
- Development of annual employee benefits statements.

Qualified firms must demonstrate competence and experience in all areas of expertise required by the scope of services.

2-2 PROPOSER QUALIFICATIONS

Adequate information and documentation must be provided in the Proposal to support or confirm satisfaction of the required qualifications below:

- The Proposer shall have extensive experience, expertise and reliability in Municipal Agent of Record services; established reputation, particularly with governmental clients; Proposer must have a minimum of five (5) years of consecutive and successful experience in the aforementioned areas.
- Proposer's track record in providing Agent of Record services to governmental agencies as well as private entities (Please provide a list of current and relevant projects, including client names, titles, phone numbers and email address. Please ensure that contact information is current.)
- Demonstrate an overall combination of skills, prior work experience, business reputation, and commitment to diversity.

2-3 TERM OF CONTRACT

The term of the contract is anticipated to be one fiscal year with a renewal of two one-year terms, subject to negotiation of terms with the contractor and the concurrence of the City of Opa-locka City Commission and availability of annual appropriation.

PART III

PROPOSAL REQUIREMENTS

3-1 RULES FOR PROPOSALS

In order to maintain comparability and enhance the review process, proposals shall be organized in the manner specified below and include all information required herein. The proposal must name all persons or entities interested in the proposal as principals. The proposal must declare that it is made without collusion with any other person or entity submitting a proposal pursuant to this RFP.

3-2 SUBMISSION OF PROPOSALS

The proposal shall be submitted on 8 ½ "x 11" paper, portrait orientation, with headings and sections numbered appropriately. Ensure that all information is written legibly or typed. The following should be submitted for a proposing firm to be considered:

3.2.1 Cover Page - Show the name of Proposer's agency/firm, address, telephone number, name of contact person, date, and the proposal number and description.

3.2.2 Tab 1 - Table of Contents

Include a clear identification of the material by section and by page number.

3.2.3 Tab 2 - Letter of Transmittal

3.2.3.1 Limit to one or two pages.

3.2.3.2 Briefly state the Proposers understanding of the work to be done and make a positive commitment to perform the work.

3.2.3.3 Give the names of the persons who will be authorized to make representations for the Proposer, their titles, addresses and telephone numbers.

3.2.3.4 Provide an official signature of a Corporate Officer certifying the contents of the Proposer's responses to the City's Request for Proposal.

3.2.4 Tab 3 - General Information

3.2.4.1 Name of Business.

3.2.4.2 Mailing Address and Phone Number.

3.2.4.3 Names and contact information of persons to be contacted for information or services if different from name of person in charge.

3.2.4.4 Normal business hours.

3.2.4.5 State if business is local, national, or international and indicate the business legal status (corporation, partnership, etc.).

3.2.4.6 Give the date business was organized and/or incorporated, and where.

3.2.4.7 Give the location of the office from which the work is to be done and the number of professional staff employees at that office.

3.2.4.8 Indicate whether the business is a parent or subsidiary in a group of firms/agencies. If it is, please state the name of the parent company.

3.2.4.9 State if the business is licensed, permitted and/or certified to do business in the State of Florida and attach copies of all such licenses issued to the business entity.

3.2.5 Tab 4 – Project Approach

Describe in detail your proposal to fulfill the requirements of the scope of services listed in section 2.2 of this RFP.

3.2.6 Tab 5 – Experience and Qualifications

3.2.6.1 Specify the number of years the Proposer has been in business.

3.2.6.2 Identify the Proposer's qualifications to perform the services identified in this RFP as listed in section 2-2 of the Scope of Services.

Include resumes, not exceeding one page each, of all key personnel who will be assigned to the City.

3.2.7 Tab 6 – Schedule

3.2.7.1 Include a timetable that identifies the amount of time required to complete each component of the Program.

3.2.7.2 Indicate the earliest available start date for your project team.

3.2.7.3 Indicate the project completion date based on the date provided in 3.2.7.1.

3.2.8 Tab 7 – Pricing of Services

3.2.8.1 Fee basis should be an all-inclusive, base fee.

3.2.9 Tab 8 – References

3.2.9.1 List a minimum of three (3) references in Florida for which the proposer has provided Agent of Record services. Include the name of the organization, brief description of the project, name of contact person telephone number and email address.

3.2.10 Tab 9 – Additional Forms

Proposers must compete and submit as part of its Proposal all of the following forms and/or documents

- Proposer Qualifications
- Certification regarding debarment and suspension
- Drug Free workplace certification

FAILURE TO SUBMIT ALL OF THE ABOVE REQUIRED DOCUMENTATION MAY DISQUALIFY PROPOSER.

PART IV

EVALUATION OF PROPOSALS

4-1 SELECTION COMMITTEE

A Selection Committee, consisting of City personnel, will convene, review and discuss all proposals submitted.

The Selection Committee will use a point formula during the review process to score proposals and assign points in the evaluation process in accordance with the evaluation criteria. The Proposer shall satisfy and explicitly respond to all the requirements of the RFP including a detailed explanation of how the services shall be performed.

Each proposal will be reviewed to determine if the Proposal is responsive to the submission requirements outlines in the Solicitation. A responsive Proposal is one which follows the requirements of this Solicitation that includes all documents are submitted in the format outlined in this Solicitation, is of timely submission, and has the appropriate signatures as required on each document. Failure to comply with these requirements may result in the Proposal being deemed non-responsive. The Contract (s) will be awarded to the most responsive proposer whose Proposal best serves the interest of and represents the best values to the City of Opa-locka.

4-2 EVALUATION CRITERIA

The Committee may select and choose to invite any and/or or all firms to make a presentation and be interviewed by the Committee as part of the evaluation process for this Solicitation. The Committee's decision will be communicated by staff to all Respondents. The Respondent's presentation may clarify but may not modify their submitted proposal. Any discussion between the presenter (s) and Evaluation Committee during presentations are intended only for purposes of providing clarification in response to questions from the Committee.

Category	Points
Experience and Qualifications / Ability of Professional Personnel/Financial Qualifications and experience of assigned staff 1. Expertise of human resources and employee benefits management in public, private and/or non-profit sectors. 2. Qualifications & experience of the firm and its subcontractors/suppliers relevant to the Scope of Work. 3. Availability of qualified personnel. 4. Ability to meet set standards. 5. Previous contracting experience with the other public, private and/or non-profit agencies. 6. Financial resources and capabilities per financial statements. 7. Evidence of insurance and/or bonding capacity. 8. Location of local office.	25

Quality of Services / Technical Approach to the Scope of Work 1. High-quality level of services to be provided to the City. 2. Understanding of City needs. 3. Ability to convey a depth of understanding of the Scope of Work and the firm's capacity to accomplish it successfully. 4. Conveyance of a willingness to work with City staff to maximize resources. 5. Approach to the Project and Methodology. 6. Technical Soundness of the proposal. 7. Applicability of the service offered.	25
Cost Saving Initiatives 1. Development of long-range cost strategies. 2. Innovative ideas for cost containment. 3. Examples of cost-savings implementation for clients that may have saved money.	25
Proposed Fee 1. Pricing Structure 2. Fee Schedule/Cost Proposal 3. Any other additional costs	25
TOTAL	100

4-3 ORAL PRESENTATIONS

Proposers may be required to make individual presentations to the City Selection Committee in order to clarify their proposals. Only those firms with the highest rated scores in accordance with the stated criteria and their weights will be invited to give oral presentations. However, the City has the right to accept the best proposal as submitted, without discussion or negotiation.

If the City determines that such presentations are needed, a time and place will be scheduled for oral presentations. Each Proposer shall be prepared to discuss and substantiate any of the areas of the proposal submitted, and its qualifications to perform the specified services. During the oral presentations, the Proposers should relate their discussion to the evaluation criteria, which will include (but not be limited to) their approach to the project. The proposed Project Manager must be in attendance.

The Evaluation Criteria may be changed for the oral presentations evaluation phase. References and site visits (if completed) shall be included in the final evaluation criteria, along with other criteria and weights as determined by the Selection Committee. Finalists will be informed as to the revised criteria, if any, prior to their oral presentation.

Additionally, prior to award of an Agreement pursuant to this RFP, the City may require Proposers to submit such additional information bearing upon the Proposer's ability to perform the services in the Agreement as the City deems appropriate.

4-4 FINAL SELECTION

The City of Opa-locka will select the firm that meets the best interests of the City. The City shall be the sole judge of its own best interests, the proposals, and the resulting negotiated agreement. The

City's decisions will be final. Following the notification of the selected firm, it is expected that an Agreement will be executed between both parties. City staff will recommend award to the responsible Proposer whose Proposal is determined to provide overall best value to the City, considering the evaluation factors in this RFP.

4-5 AWARD AND CONTRACT EXECUTION

After review by the Selection Committee of the proposals and oral presentations a recommendation will be made to the City Manager for submission to the City Commission for final approval. Upon Commission authorization, contract negotiations will be initiated with the first ranked firm. If those negotiations are unsuccessful, the City will formally terminate negotiations with the first ranked firm and will commence contract negotiations with the next ranked firm, etc. Upon successful contract negotiations with the prevailing firm, the remaining firms will be notified that the process has been completed and that they were not selected.



AGENT OF RECORD FOR EMPLOYEE BENEFIT PROGRAMS

PROPOSER QUALIFICATIONS

The Proposer, as a result of this proposal, MUST hold a County and/or Municipal Contractor's Occupational License in the area of their fixed business location. The following information MUST be completed and submitted with the proposal to be considered:

1. Legal Name and Address:

Name: _____

Address: _____

City, State, Zip: _____ Phone/Fax: _____

2. Check One: Corporation () Partnership () Individual ()

3. If Corporation, state:

Date of Incorporation: _____ State in which Incorporated: _____

4. If an out-of-state Corporation, currently authorized to do business in Florida, give date of such authorization: _____

5. Name and Title of Principal Officers

Date Elected:

_____	_____
_____	_____
_____	_____
_____	_____

6. The length of time in business: _____ years

7. The length of time (continuous) in business as a service organization in Florida:
_____ years

8. Provide a list of at least three commercial or government references that the bidder has supplied service/commodities meeting the requirements of the City of Opa-locka specification, during the last twenty-four months.

9. A copy of County and/or Municipal Occupational License(s)

Note: Information requested herein and submitted by the proposers will be analyzed by the City of Opa-locka and will be a factor considered in awarding any resulting contract. The purpose is to insure that the Contractors, in the sole opinion of the City of Opa-locka, can sufficiently and efficiently perform all the required services in a timely and satisfactory manner as will be required by the subject contract. If there are any terms and/or conditions that are

in conflict, the most stringent requirement shall apply.



RFP NO: 21-0629100
PRICE PROPOSAL FORM

AGENT OF RECORD FOR EMPLOYEE BENEFIT PROGRAMS

PROPOSER understands and agrees that the Contract Price is the lump sum to furnish and install all of the Work complete in place. Vendor's price will not be adjusted unless the CITY changes the scope of the Project after the Contract Date.

As such, the Vendor shall furnish all labor, materials, equipment, tools, superintendence and services necessary to provide a complete, in place Project for the Proposed Price of:

LUMP SUM PRICE: \$_____

SUBMITTED THIS _____ DAY OF _____ 2021.

BID SUBMITTED BY:

Company

Telephone Number

Name of Person Authorized to Submit
Bid

Fax Number

Signature

Email Address

Title



CITY OF OPA-LOCKA

CERTIFICATION REGARDING DEBARMENT, SUSPENSION PROPOSED DEBARMENT AND OTHER MATTERS OF RESPONSIBILITY

1. The Proposer certifies, to the best of its knowledge and belief, that the Proposer and/or any of its Principals:

A. Are not presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency.

B. Have not, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property; and

C. Are not presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph 1-B of this provision.

2. The Proposer has not, within a three-year period preceding this offer, had one or more contracts terminated for default by any City, State or Federal agency.

A. "Principals," for the purposes of this certification, means officers; directors; owners; partners; and, persons having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions). This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution Under Section 1001, Title 18, United States Code.

B. The Proposer shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Proposer learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

C. A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the Proposer's responsibility. Failure of the Proposer to furnish a certification or provide such additional information as requested by the Contracting Officer may render the Proposer non-responsive.

D. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of a Proposer is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.

E. The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Proposer knowingly rendered an erroneous certification, in addition to other remedies available to the Government, the Contracting Officer may terminate the contract resulting from this solicitation for default.

AS THE PERSON AUTHORIZED TO SIGN THE STATEMENT, I CERTIFY THAT THIS FIRM COMPLIES FULLY WITH THE ABOVE REQUIREMENTS.

Signature _____

Printed Name _____



CITY OF OPA-LOCKA
RFP NO. 21-0629100

DRUG-FREE WORKPLACE CERTIFICATION FORM

Whenever two (2) or more bids/proposals, which are equal with respect to price, quality, and service, are received by the CITY OF OPA-LOCKA for the procurement of commodities or contractual services, a bid/proposal received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of controlled substances is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in number (1).
4. In the statement specified in number (1), notify the employees that as a condition for working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction on or plea of guilty or no contest to any violation of Chapter 893, Florida Statutes or of any controlled substance law of the United States or any singular state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of Section 287.087, Florida Statutes.

This Certification is submitted by _____ the
(Name)
_____ of _____
(Title/Position) (Company)

who does hereby certify that said Company has implemented a drug-free workplace program, which meets the requirements of Section 287.087, Florida Statutes, which are identified in numbers (1) through (6) above.

Date

Signature



CITY OF OPA-LOCKA
NON-COLLUSION AFFIDAVIT

STATE OF FLORIDA - COUNTY OF MIAMI DADE

_____being first duly sworn, deposes and says that:

- (1) He/She/They is/are the _____
(Owner, Partner, Officer, Representative or Agent) of
_____the PROPONENT that has submitted the attached proposal;
- (2) He/She/They is/are fully informed respecting the preparation and contents of the attached Proposal and of all pertinent circumstances respecting such Proposal;
- (3) Such Proposal is genuine and is not a collusive or sham Proposal;
- (4) Neither the said PROPONENT nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, have in any way colluded, conspired, connived or agreed, directly or indirectly, with any other PROPONENT, firm, or person to submit a collusive or sham Proposal in connection with the Work for which the attached Proposal has been submitted; or to refrain from Proposing in connection with such Work; or have in any manner, directly or indirectly, sought by agreement or collusion, or communication, or conference with any PROPONENT, firm, or person to fix any overhead, profit, or cost elements of the Proposal or of any other PROPONENT, or to fix any overhead, profit, or cost elements of the Proposed Price or the Proposed Price of any other PROPONENT, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the proposed Work;
- (5) The price or prices quoted in the attached Proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the PROPONENT or any other of its agents, representatives, owners, employees or parties of interest, including this affiant.

Signed, sealed and delivered in the presence of:

Witness

By: _____
Signature

Witness

Print Name and Title



NON-DISCRIMINATION AFFIDAVIT

I, the undersigned, hereby duly sworn, depose and say that the organization, business or entity represented herein shall not discriminate against any person in its operations, activities or delivery of services under any agreement it enters into with the City of Opa-locka. The same shall affirmatively comply with all applicable provisions of federal, state and local equal employment laws and shall not engage in or commit any discriminatory practice against any person based on race, age, religion, color, gender, sexual orientation, national origin, marital status, physical or mental disability, political affiliation or any other factor which cannot be lawfully used as a basis for service delivery.

By: _____

Title: _____

Sworn and subscribed before this

____ day of _____, 20____

Notary Public, State of Florida

(Printed Name)

My commission expires: _____



E-VERIFY

Effective January 1, 2021, public and private employers, contractors and subcontractors will be required to register with, and use of the E-verify system in order to verify the work authorization status of all newly hired employees. Vendor/Consultant/Contractor acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of:

- a) All persons employed by Vendor/Consultant/Contractor to perform employment duties within Florida during the term of the contract; and
- b) All persons (including sub-vendors/sub-consultants/sub-contractors) assigned by Vendor /Consultant/ Contractor to perform work pursuant to the contract with the Department. The Vendor /Consultant/ Contractor acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the contract is a condition of the contract with the City; and

By entering into a Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes but is not limited to utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The contractor shall maintain a copy of such affidavit for the duration of the contract. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. If a contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination. The Contractor acknowledges it is liable to the City for any additional costs as a result of termination of the contract due to Contractor's failure to comply with the provisions herein.



E-VERIFY FORM

Definitions:

“Contractor” means a person or entity that has entered or is attempting to enter into a contract with a public employer to provide labor, supplies, or services to such employer in exchange for salary, wages, or other remuneration.

“Subcontractor” means a person or entity that provides labor, supplies, or services to or for a contractor or another subcontractor in exchange for salary, wages, or other remuneration.

Effective January 1, 2021, public and private employers, contractors and subcontractors will begin required registration with, and use of the E-verify system in order to verify the work authorization status of all newly hired employees. Vendor/Consultant/Contractor acknowledges and agrees to utilize the U.S. Department of Homeland Security’s E-Verify System to verify the employment eligibility of:

- a) All persons employed by Vendor/Consultant/Contractor to perform employment duties within Florida during the term of the contract; and
- b) All persons (including sub-vendors/subconsultants/subcontractors) assigned by Vendor/Consultant/Contractor to perform work pursuant to the contract with the Department. The Vendor/Consultant/Contractor acknowledges and agrees that use of the U.S. Department of Homeland Security’s E-Verify System during the term of the contract is a condition of the contract with the City of Opa-locka; and

Should vendor become successful Contractor awarded for the above-named project, by entering into this Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes but is not limited to utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The contractor shall maintain a copy of such affidavit for the duration of the contract. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. If this contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination.

Company Name: _____

Authorized Signature: _____

Print Name: _____

Title: _____

Date: _____

EXHIBIT “B”
SCOPE OF SERVICES

NATURE OF SERVICES REQUIRED

PURPOSE AND SCOPE OF WORK

The City of Opa-locka seeks proposals from qualified firms to provide Brokerage and Consulting Services for the City’s employee benefit services. The successful Proposer will obtain competitive market quotes and will provide enrollment and administrative support services for a wide range of employer group and individual employee benefits as further provided herein.

The City has approximately 248 employees and retirees participating in the benefit plans.

The benefit plans should include the following, but is not limited to:

- Health Insurance
- Dental Insurance
- Life Insurance
- Long Term Disability
- Short Term Disability
- Vision
- Voluntary Benefits Services
- Serve as the City’s Broker of Record/Consultant and provide such brokerage services to the Employer to ensure comprehensive and cost-effective benefits are included in the City’s benefit plans for selection by the City’s eligible employee and retirees.
- Present plan design recommendations that support the City’s benefits strategies and position the Employer to comply with Federal, State and other regulatory requirements each year.
- Administer the City’s health and welfare plans, including setting reserves, reporting experience and projecting funding levels when applicable.
- Provide ongoing advice on ERISA, COBRA, FMLA, and HIPAA reporting obligations, and other laws and regulations affecting the City’s benefit plans as it relates to the insurance products within this RFP.
- Provide comprehensive services (traditional and web-based) necessary to enroll current plan designs, plan modifications and consumer education.
- Provide comprehensive services necessary to serve Voluntary Benefits, including enrollment support and election reconciliation.
- Provide a call center with representatives to respond to City employees and retirees.
- Shall agree that all data exchanged between the selected Proposer and the Employer or prospective customers belongs to the Employer and shall be accessible at any time during the life of the contract for no additional fee.
- The Proposer must provide a benefits administration technology platform to be accessible year-round for new hire enrollment and change in status elections of benefits.
- Provide technical assistance to reduce the overall cost of providing these benefits through a variety of means including developing effective negotiation strategies to expeditiously reduce the absolute cost of health insurance benefits.
- Solicit and negotiate annual renewal of existing coverage including soliciting multiple or alternative proposal coverage.
- A comprehensive summary of responsive quotes from insurance carriers will be presented to the City Manager.
- Respond to all employee issues and questions in a timely manner regarding their benefits.
- Provide City with dedicated agents for any assistance needed.

- Provide the City with support for the wellness program.
- Support the City in organizing and coordinating two (2) employee wellness fairs annually.
- Assist the City in the evaluation and implementation of a wellness and disease management program and measure the effectiveness of the program.
- Provide a program for ACA Tracking and 1095 reporting, which includes mailing out forms.
- Identify claim trends and anomalies in a timely manner and prepare recommendations to the City on actions to be taken, if any.
- Review, process and administer all employee claim issues.
- Review historical claims experience, demographic data trends and plans performance from a financial prospective.
- Coordinate and participate in the implementation and enrollment process and employee meetings.
- Assist in the review and or creation of enrollment materials to enhance the overall perceived value of the benefits and compensation.
- Coordination of annual benefits fair at no cost to the City.
- Preparation of insurance applications, compile and format support information needed and requested by insurance company underwriters.
- Compile and maintain historical underwriting information. Provide copies of this information to the City.
- Development of annual employee benefits statements.

Qualified firms must demonstrate competence and experience in all areas of expertise required by the scope of services.

REQUEST FOR PROPOSAL (RFP)

AGENT OF RECORD FOR EMPLOYEE BENEFIT PROGRAMS

RFP NO: 21-0629100



CITY OF
OPA-LOCKA
FLORIDA



Presented by

Rachel Sapoznik, President
rachels@sapoznik.com

Eugene Mintze III, Benefits Consultant
eugenem@sapoznik.com

Sapoznik Insurance, A World Company

1100 NE 163rd Street
North Miami Beach, FL 33162

Office: 877-948-8887

Visit us online at
WWW.SAPOZNIK.COM

sapoznik.
A WORLD COMPANY

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3.2.3 TAB 2: LETTER OF TRANSMITTAL

TOP FIVE TRENDS IMPACTING THE WORKPLACE

#1: Employees are more concerned with safety and expect their employers to play a greater role.

Source: MetLife's 19th Annual U.S. Employee Benefit Trends Study 2021



Dear Selection Committee,

On behalf of Sapoznik Insurance, a [World Company](#), we are pleased to submit our response to your request for proposal for Agent of Record for Employee Benefit Programs. We are proud of what have accomplished together and appreciate the opportunity to participate in this process.

Although we hope to be in the home stretch of these unprecedented times, one thing is certain; healthcare has never been more top of mind. If there is a lesson to be learned from the pandemic, it is that we need to remain nimble, understand the importance of employee education, take a holistic approach to wellness, and to modify our strategy and services with technology. We use employee benefits portals, customized websites, text messaging, virtual wellness classes, and virtual meetings to expedite employee communications and increase engagement. Although the technological advancements are critical, the human element is still essential. We believe that the key is to embrace technology while never losing sight of the importance of the human touch.



Click to play video

Through this response, we hope to demonstrate that a continued partnership with Sapoznik Insurance will have a positive impact on the engagement of your team in your benefits program through education and innovative initiatives, cutting edge technology, recruitment and retention, and the containment of escalating healthcare costs. We understand your organization, the complexity of managing the challenges of limited resources and sometimes overwhelming priorities in the human resources area and are fully prepared and committed to continue to support the employees of the City of Opa-locka.



Rachel Sapoznik, President

Sapoznik Insurance, A World Company
1100 NE 163 Street
North Miami Beach, FL 33162
305.948.8887

Eugene Mintze, Benefits Consultant

Sapoznik Insurance, A World Company
1100 NE 163 Street
North Miami Beach, FL 33162
754.423.7747

Akin Ayodele, Business Development Executive

Sapoznik Insurance, A World Company
1100 NE 163 Street
North Miami Beach, FL 33162
305.948.8887

Robin Konikoff, Client Manager

Sapoznik Insurance, A World Company
1100 NE 163 Street
North Miami Beach, FL 33162
305.948.8887

Our respective organizations believe in the importance of health and well-being, in our dedication to each employee's success, to serve the communities we are part of, and to deliver on the promise to make a difference in the lives of individuals. We look forward to the opportunity to continue our journey together as your partner and achieve success during these extraordinary times. We are Opa-locka!

Sincerely,

A handwritten signature in black ink, appearing to read "Rachel Sapoznik".

Rachel Sapoznik
President
Sapoznik Insurance, A World Company

3.2.4 TAB 3: GENERAL INFORMATION

DID YOU KNOW?

**62% of employees
think employee
benefits are more
important now
because of the
pandemic**

Source: MetLife's 19th Annual U.S. Employee Benefit Trends Study 2021



3.2.4.1 Name of Business.

Sapoznik Insurance, A World Company

3.2.4.2 Mailing Address and Phone Number.

1100 NE 163rd Street, North Miami Beach, FL 33162

305.948.8887

3.2.4.3 Names and contact information of persons to be contacted for information or services if different from name of person in charge.

Eugene Mintze, Benefits Consultant

eugenem@sapoznik.com

754.423.7747

Robin Konikoff, Client Manager

robink@sapoznik.com

305.948.8887

3.2.4.4 Normal business hours.

Monday – Friday

8:30 AM – 5:30 PM

Should you need assistance outside of our normal business hours, we will provide cell phone numbers for key contacts as well as contact information for the carriers directly.

3.2.4.5 State if business is local, national, or international and indicate the business legal status (corporation, partnership, etc.)

Sapoznik Insurance was acquired in September of 2020 by World Insurance Associates LLC. Sapoznik Insurance serves as the employee benefits division and continues to operate with the same personnel from the same location in North Miami Beach. Sapoznik has been serving the needs of the South Florida community for 34 years. World Insurance Associates is a limited liability corporation and is a nationally ranked, full-service insurance brokerage providing individuals and businesses with products and services across personal and commercial insurance lines, employee benefits, retirement and financial services, and human capital management solutions. Since its founding in 2012, World has completed 102 acquisitions and serves its customers from 150 offices with 1,300 employees across the United States. World is a Top-100 U.S. Broker, ranked #2 on the Fastest Growing Brokers list by Business Insurance, and is a Top-50 ranked personal lines agency by Insurance Journal.

LARGE RESOURCES.
LOCAL RELATIONSHIPS.

WORLD

World By the Numbers

LARGE RESOURCES. LOCAL RELATIONSHIPS.

Our consistent growth strategy means our clients benefit from two key advantages—the large-scale resources of a major national agency and the personalized, white-glove service from a local agent. As World continues to grow, our commitment to our clients remains the same—to deliver the best of both worlds.

INDUSTRY RANKINGS

100 LARGEST BROKERS OF U.S. BUSINESS

Business Insurance

Ranked by total U.S. client revenue from previous year.

YEAR	RANKING	REVENUE
2021	TBD	~\$81.0 Million
2020	#62	\$53.3 Million
2019	#96	\$28.4 Million



TOP 100 INDEPENDENT P&C AGENCIES

Insurance Journal

Ranked by total P/C revenue from previous year.

YEAR	RANKING	REVENUE
2021	TBD	~\$53.4 Million
2020	#41	\$52.3 Million
2019	#77	\$28.4 Million



TOP 50 PERSONAL LINES AGENCIES

Insurance Journal

Ranked by personal lines P/C revenue from previous year.

YEAR	RANKING	REVENUE
2021	TBD	~\$16.5 Million
2020	#38	\$10.8 Million
2019	#49	\$6.0 Million



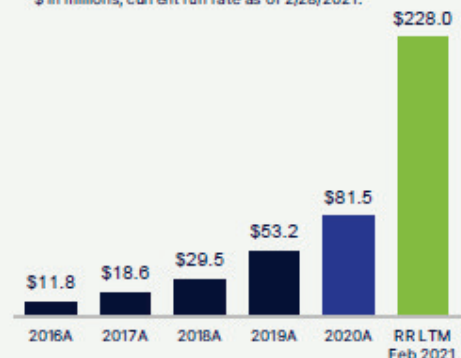
#2 Fastest Growing Brokers
by *Business Insurance*
2020

KEY STATS

- 2011 founded in Tinton Falls, NJ
- 2020 investment by Charlesbank
- 150+ offices with 1,320+ employees
- 26% employee owned
- \$81MM in 2020 revenue
- \$228MM in run-rate revenue
- 102 acquisitions completed
- 15 acquisitions under LOI
- 200,000+ clients
- 260+ carriers
- 150+ MGAs and wholesalers
- \$2+ million in IT investment

REVENUE & BUSINESS MIX

\$ in millions, current run rate as of 2/28/2021.



3.2.4.6 Give the date business was organized and/or incorporated, and where.

Sapoznik Insurance & Associates, 1987 in Miami-Dade County

World Insurance Associates LLC, 2012 in Tinton Falls, New Jersey

3.2.4.7 Give the location of the office from which the work is to be done and the number of professional staff employees at that office.

1100 NE 163rd Street

North Miami Beach, FL 33162

30 CULTURALLY DIVERSE TEAM MEMBERS

3.2.4.8 Indicate whether the business is a parent or subsidiary in a group of firms/agencies. If it is, please state the name of the parent company.

Sapoznik Insurance & Associates is owned by World Insurance Associates LLC

3.2.4.9 State if the business is licensed, permitted and/or certified to do business in the State of Florida and attach copies of all such licenses issued to the business entity.

Yes, we are licensed, permitted, and certified to do business in the State of Florida.

FLORIDA DEPARTMENT OF FINANCIAL SERVICES

SAPOZNIK INSURANCE ASSOCIATES, LLC

1100 NE 163RD STREET

2ND FLOOR

NORTH MIAMI BEACH FL 33162

Agency License Number L056952

Location Number: 184301

Issued On 11/03/2014

Pursuant To Section 626.0428, Florida Statutes, This Agency Location Shall Be In The Active Full-Time Charge Of A Licensed And Appointed Agent Holding The Required Agent Licenses To Transact The Lines Of Insurance Being Handled At This Location.

Pursuant To Subsection 626.172(4), Florida Statutes, Each Agency Location Must Display The License Prominently In A Manner That Makes It Clearly Visible To Any Customer Or Potential Customer Who Enters The Agency Location.



Jeff Atwater
Chief Financial Officer
State of Florida

FLORIDA DEPARTMENT OF FINANCIAL SERVICES

EUGENE MINTZE III

License Number : P139604

Resident Insurance License

●0215 - LIFE INCL VAR ANNUITY & HEALTH

Issue Date

03/28/2008

Please Note: A licensee may only transact insurance with an active appointment by an eligible insurer or employer. If you are acting as a surplus lines agent, public adjuster, or reinsurance intermediary manager/broker, you should have an appointment recorded in your own name on file with the Department. If you are unsure of your license status you should contact the Florida Department of Financial Services immediately. This license will expire if more than 48 months elapse without an appointment for each class of insurance listed. If such expiration occurs, the individual will be required to re-qualify as a first-time applicant. If this license was obtained by passing a licensure examination offered by the Florida Department of Financial Services, the licensee is required to comply with continuing education requirements contained in 626.2815 or 648.385, Florida Statutes. A licensee may track their continuing education requirements completed or needed in their MyProfile account at <https://doe.flds.com>. To validate the accuracy of this license you may review the individual license record under "Licensee Search" on the Florida Department of Financial Services website at <http://www.MyFloridaCFO.com/Division/Agents>

Jimmy Patronis

Jimmy Patronis
Chief Financial Officer
State of Florida

FLORIDA DEPARTMENT OF FINANCIAL SERVICES

ROBIN JILL BOURASSA

License Number : W545787

Resident Insurance License

●0215 - LIFE INCL VAR ANNUITY & HEALTH

Issue Date

02/05/2019

Please Note: A licensee may only transact insurance with an active appointment by an eligible insurer or employer. If you are acting as a surplus lines agent, public adjuster, or reinsurance intermediary manager/broker, you should have an appointment recorded in your own name on file with the Department. If you are unsure of your license status you should contact the Florida Department of Financial Services immediately. This license will expire if more than 48 months elapse without an appointment for each class of insurance listed. If such expiration occurs, the individual will be required to re-qualify as a first-time applicant. If this license was obtained by passing a licensure examination offered by the Florida Department of Financial Services, the licensee is required to comply with continuing education requirements contained in 626.2815 or 648.385, Florida Statutes. A licensee may track their continuing education requirements completed or needed in their MyProfile account at <https://doe.flds.com>. To validate the accuracy of this license you may review the individual license record under "Licensee Search" on the Florida Department of Financial Services website at <http://www.MyFloridaCFO.com/Division/Agents>

Jimmy Patronis

Jimmy Patronis
Chief Financial Officer
State of Florida

FLORIDA DEPARTMENT OF FINANCIAL SERVICES

RACHEL ABITBOL SAPOZNIK

License Number : A231974

Resident Insurance License

- 0215 - LIFE INCL VAR ANNUITY & HEALTH
- 0216 - LIFE
- 0256 - LEGAL EXPENSE
- 0240 - HEALTH
- 0218 - LIFE & HEALTH

Issue Date

09/27/1982
06/16/1982
02/04/1999
06/16/1982
06/16/1982

Please Note: A licensee may only transact insurance with an active appointment by an eligible insurer or employer. If you are acting as a surplus lines agent, public adjuster, or reinsurer/intermediary reinsurer/broker, you should have an appointment recorded in your own name on file with the Department. If you are unsure of your license status, you should contact the Florida Department of Financial Services immediately; this license will expire 1 more than 18 months unless without an appointment for each class of insurance listed. If such expiration occurs, the individual will be required to re-qualify as a licensee applicant. If this license was obtained by passing a licensee examination offered by the Florida Department of Financial Services, the licensee is required to comply with continuing education requirements contained in 62B.015 or 64B.015, Florida Statutes. A licensee may track their continuing education requirements completed or needed in their MyProfile account at <https://dca.flds.com>. To validate the accuracy of this license, you may review the individual license record under "Licensee Search" on the Florida Department of Financial Services website at <http://www.MyFloridaCFO.com/> or <http://www.flds.com>.

Jimmy Patronis

Jimmy Patronis
Chief Financial Officer
State of Florida

FLORIDA DEPARTMENT OF FINANCIAL SERVICES

AKIN JAYODELE

License Number : W740688

Resident Insurance License

- 0215 - LIFE INCL VAR ANNUITY & HEALTH

Issue Date

05/11/2021

Jimmy Patronis

Jimmy Patronis
Chief Financial Officer
State of Florida

3.2.5 TAB 4: PROJECT APPROACH

TOP FIVE TRENDS IMPACTING THE WORKPLACE

#2 More than half of employees are now concerned about their well-being. And that's hurting productivity.

Source: MetLife's 19th Annual U.S. Employee Benefit Trends Study 2021



Describe in detail your proposal to fulfill the requirements of the scope of services listed in section 2.2 of this RFP.

SERVICE PHILOSOPHY

At Sapoznik Insurance, **our most important differentiator** is **our commitment to service**. Our philosophy is delivering unparalleled customer service, while bringing value to your employee benefits program. We strive to anticipate and fulfill every request and need that our clients have, surpassing expectations.

The cornerstones of our service philosophy are defined by responsiveness, support, health education, advocacy, and technology. We are committed to utilizing our collective talent and technological advancements in the management of healthcare to support your employee benefits goals. We strive to identify activities that drive claim frequency and implement an action plan to control healthcare costs and promote a healthy work environment for your employees. Sapoznik specializes in evaluating, negotiating with, and recommending insurers and providers to our clients. In this process, we employ a rigorous selection criteria and performance objectives when considering an insurance carrier.

Contact	We meet with clients monthly to ensure carriers, coverage and costs are meeting expectations
Educate	We conduct employee meeting and provide customized communication materials for employees based on your specific plan
Advocate	We work on your behalf to bring an unbiased perspective to all situations, with no allegiance to any specific carrier or vendor
Personnel	We hire and maintain a professional, experienced staff and ensure that they are up to date on all the latest trends and information
Inform	We have information and expertise that allows us to negotiate comprehensive, competitive benefits programs and we provide the most accurate responses to your insurance, employee benefits and human resources questions

Our range of value-added services for clients includes delivering custom solutions for all their healthcare management needs, including benefit plan analysis, contribution strategies, health and wellness education, training, claims analysis, and developing employee policies and consumer-driven programs.

We understand that not every employee in an organization sits behind a desk or workstation or works conventional hours. Therefore, Sapoznik has created and implemented innovative communication techniques and personal outreach sessions that educate on effective use of benefit plans, and wellness programs that positively impact medical claims and the overall well-being of the population.

Spectrum of Benefits

From compliance to communication, we provide a full spectrum of solutions for you and your organization. We understand the challenge today's employers face, and we know you are asked to take on more than ever before.



Sapoznik continuously evaluates our support structure to ensure that the needs of our clients are always being met. Our operational structure was designed with our clients in mind. Each department works together to ensure success through teamwork.

Benefits Consultant

Your Benefits Consultant is involved with your program on an on-going basis to ensure that the plan administration and all vendor relationships are running smoothly. They are responsible for collecting and analyzing information, compiling reports, and conducting financial analyses, as well as negotiating with carriers to provide the best possible plans and price structure at renewal.

Client Managers

Your Client Managers are available to assist in the day-to-day activities and provide prompt service and guidance with respect to the overall benefits package. They work with vendors to ensure everything is working smoothly, conduct billing audits and resolve all issues related to any vendor partner. All support personnel are HIPAA certified and cross trained to ensure adequate depth of support and have invaluable insight when it comes to negotiating with carriers and designing cost effective health insurance plans.

Claims Advocacy and Customer Support

Should employee claims become a concern; we want your employees focused on their work responsibilities. Therefore, some claims will be escalated to our claims advocates to follow through and resolve. These can include difficult claims, incorrect billing, or coding issues. To be able to share confidential information, our claims advocates are HIPAA certified. This alleviates your HR Department from this specific risk.

90% success rate in negotiating claims, the highest in the industry

Sapoznik Insurance customer support guarantees our clients a **24-hour response time**. We understand that in many cases, dealing with insurance claims and processing can be urgent and our team does not take this responsibility lightly.

The inbound calls are handled by individuals who possess 20+ years of claims and medical billing knowledge. They act as a liaison between providers, hospitals, clients, and HR departments. Our claims department boasts a **90% success rate in negotiating claims, the highest in the industry**.

- Review adjudicated medical claims, determine levels of completeness, accuracy, and timeliness
- Prepare and deliver appeal and grievance letters to carriers and providers
- Monitor completed work processes and cross reference with state and federal law
- Identify overpaid claims, payment errors, coding errors and missing information on claims
- Determine and establish medical necessity negotiations with providers for utilization of out-of-network services
- Assistance with prescription issues and copay discrepancies

STRATEGIC PLANNING AND HR SUPPORT

Sapoznik prides itself in our dedication to making your organization successful. This dedication includes identifying cost containment strategies. We proactively manage the entire benefits program to ensure we are constantly looking for opportunities for **cost containment** and **proper plan utilization**. We understand that healthcare costs continue to be a serious concern.

Sapoznik Insurance can assist by:

- Helping employees understand their benefits and become better healthcare consumers
- Managing and reducing redundancy of claims
- Establishing proper plan designs
- Proactively implementing wellness initiatives to help reduce claims from preventable illnesses

We are an **extension of your Human Resources Department**, and as such, we participate in meetings to discuss your goals for the year, any challenges, and the strategies we will put in place to obtain the desired outcome. We also have experience in helping with the development of a multi-year strategic plan for employee benefits. We assist with presentation materials as needed.

As an example of the strategic thinking we bring to the table for the benefits program - our focus begins with the employee. If you start by thinking about the employee and how best to support their care and that of their family, the rest falls into place. Every single time an employee engages the health plan, we have an opportunity to try and accomplish what we call our triple aim.

The triple aim is:

1. How can we help our families get predictably better medical outcomes?
2. How can we reduce the out-of-pocket exposure for our families (i.e., their co-pays, deductibles, and their premium contribution)?
3. Since the health insurance premium is directly correlated to the underlying cost of the claims, how can we lower the claim costs for the employer?

Based on our extensive knowledge and experience in generating savings without compromising the quality of the benefits provided, we will perform a comprehensive cost analysis of benefits and utilization. By analyzing medical and prescription utilization reports - medical loss ratio, medical claim trend, provider network discounts, administrative fees, prescription drug cost trend, generic drug substitution rate and prescription drug rebates, to name just a few, we are able to

identify opportunities to further implement cost containment strategies while keeping in mind the unique needs of the City of Opa-locka. The use of alternative funding mechanisms will depend on each individual company's demographics, prior claims experience, and tolerance for risk, financial and administrative resources, and interest in promoting wellness.

Strategies currently being utilized and/or to be considered include - alternative funding options, employee education to encourage healthcare consumerism, prescription drug management, risk management, and medical advocacy programs.

Tools and initiatives include:

- Health risk assessments
- Incentive management
- Nurse advisory line
- Care coordinators
- Predictive modeling and claims analytics
- Data management
- Clinical health coaching
- Client portal
- Wellness programs
- Claim line audits of all hospital and facility claims

MARKET ANALYSIS

Sapoznik is dedicated to securing impartial, objective benefit quotes every year, typically, a minimum of three to six months prior to the renewal date. A key element of this process includes the identification of new product offerings and funding mechanisms which may contribute to savings and improved plan offerings. The process continues with us aggressively negotiating with health insurance providers and underwriters to secure the most competitive rates for the most effective level of coverage.

Prior to your renewal, our Marketing Analysts begin the process of submitting employee census data to all the major insurance carriers. Our thorough analysis permits us to present only the most competitive proposals from carriers, providing a comprehensive spectrum of choice among benefit types and cost ranges. Within those ranges, Sapoznik creates an easy to interpret comparison spreadsheet presentation used to illustrate every benefit and plan design.

In today's environment, all clients are looking for advice on how to change or restructure their benefits and control costs, while not decreasing the actual benefits provided. Renewals do not have to be a surprise. In the age of big data, where an endless amount of benefits program information is available, there is ample intelligence available for a broker to project the new rate. It also pays to understand the drivers that will impact your renewal.

Sapoznik Insurance does not leave your renewal until the last minute. We take steps throughout the year to identify and prevent unsustainable trends by:

- Approaching your **renewal** as a **year-long process** with predetermined dates for review and analysis
- Providing an **employee advocacy** center to administer plan participant claims and inquiries with analysis of the cost and utilization challenges that your users are encountering
- Offering a **wellness program**, which allows us to extract data about your organization's health challenges that are driving up claims
- **Mitigating risks** and traps by using benefits administration technology and managing your annual and day-to-day management. These solutions can give you additional access to essential data for projecting your next renewal. Sapoznik Insurance is well-acquainted with the time, cost, efficiency, and potential regulatory pitfalls associated with plan administration.
- Offering a **healthcare insurance consumerism educational campaign**. When employers offer benefits without supporting employee education, your team members do not understand how their utilization impacts the insurance rate or their out-of-pocket costs.

We know that keeping the lid on renewal rates is not an easy process. It requires a thoughtful review of program data and an understanding of the rationale that the carrier's underwriters apply when calculating your renewal premiums. Armed with this information, as your partner, we analyze the forensics of your current plan and identify cost risks that can potentially be mitigated.

The key to a **no-surprise renewal** is to proactively plan for rate adjustments as much as possible and to **anticipate** how your health insurance program will be impacted. The basis of this project is capturing and analyzing program data.

Plan decision support is critical for cost containment:

- Through **benchmarking**, we can show you how your group's healthcare claims compare to the industry and regional norms, to identify cost and utilization disparities.
- Our sophisticated **analytics** help us dig deep into your real claims data, to isolate specific cost drivers that we can address with targeted plan decision strategies to help manage high healthcare costs.
- Altering plan design is one strategic solution we can implement after analyzing your data. We go one step further by using a **plan modeler** to evaluate different scenarios and the impact of those changes, prior to making any decisions.

Marketing your benefits plans is also key and is done with the objective of avoiding disruptions that can arise by a change in carriers. We know that jumping from carrier to carrier to avoid rate increases isn't a strategy — it's a reaction that could potentially cost you money. We strategize to identify the most competitive rates available while ensuring the incumbent carrier stays competitive.

Cost Savings Example 1

During renewal, Client A received a proposed 36% increase from Florida Blue. They budgeted a 15% increase for the upcoming year. We created a new plan with no change in co-pays to primary care physicians, specialists, and urgent care facilities. The reasoning behind this was to educate and encourage the use of urgent care facilities for non-life-threatening cases. We educated employees regarding the advantages of urgent care facilities versus the use of hospital emergency rooms. This ultimately reduces the cost of the plan and protects against higher renewal rates.

Plan design changes were instrumental in reducing costs for the current year renewal, but also looking to reduce employee out of pocket expenses. Emergency room costs went from a \$200 to a \$300 co-pay, and we moved inpatient from a \$700 co-pay to a deductible + 20%. By instituting a GAP plan, we negated the employees' cost for inpatient expenses and educated on the value and use of GAP insurance.

By adding a \$6,500 inpatient Gap with a \$3,250 for outpatient, we covered the deductible and the coinsurance at 100% for inpatient stays. The employees first \$3,250 was paid by the GAP for any outpatient procedure.

By implementing these changes and adding the Gap plan, the total increase was less than 1%. The renewal was at a 7% increase and the following year would be a 4% increase. If you split the 12% over the three year period, it is an average of 4% on a yearly basis. We were still below the

budgeted 15% increase. The group and members love the plan and the Gap. They have learned to utilize the plan to its fullest through ongoing education. The education is shared with the employer and the employee to keep the overall premium and payroll deductions stable. Education is focused on preventative care and how and where to seek care when needed.

Company/Plan	<u>Current</u>		<u>NEW PLAN W/REVISIONS</u>	
	BCBS- BlueOptions 3768		BCBS BlueOptions 03566 Mod	
	In-Network	Out-Network	In-Network	Out-Network
Physician	\$10 CO-PAY	\$40 CO-PAY	\$10 CO-PAY	DED & 50%
Specialist	\$25 CO-PAY	\$60 CO-PAY	\$25 CO-PAY	DED & 50%
Adult & Child Wellness Adult Wellness Max	COVERED 100% AFTER OFFICE VISITS CO-PAY (NO MAX)		COVERED 100% (NO MAX)	50% (NO MAX)
Mammograms	COVERED 100%	DED & 50%	COVERED 100%	DED & 50%
Emergency Room - Waived if Admitted	\$200 CO-PAY	DED & 50%	\$300 CO-PAY \$0 With GAP**	
Urgent Care	\$50 CO-PAY	DED & 50%	\$50 CO-PAY \$0 With GAP**	DED & 50%
Independent Clinical Lab	COVERED 100%	DED & 50%	COVERED 100%	DED & 50%
Diagnostic Testing / MRI, CAT Scans	\$200 CO-PAY	DED & 50%	\$200 CO-PAY \$0 With GAP**	DED & 50%
Outpatient Surgery - Ambulatory Surgical Center	\$200 CO-PAY	DED & 50%	DED & 80% \$0 With GAP**	DED & 50%
Provider Services Ambulatory Surgery Center	\$10/\$25 CO-PAY	\$40 CO-PAY	DED & 80% \$0 With GAP**	DED & 50%
Outpatient Surgery - Hospital	\$300 / \$600 CO-PAY	DED & 50%	DED & 80% \$0 With GAP**	DED & 50%
Inpatient Hospital	\$700 / \$1000 CO-PAY	DED & 50%	DED & 80% \$0 With GAP*	DED & 50%
Provider Services Hospital	\$50 CO-PAY		IN-NET DED & 80%	
Home Health	DED THEN 100% 75 VISITS	DED & 50% 75 VISITS	DED & 80% 20 VISITS	DED & 50% 20 VISITS
Outpatient Therapy	\$45 / \$60 CO-PAY 75 VISITS	DED & 50% 75 VISITS	\$45/\$60 CO-PAY 35 VISITS	DED & 50% 35 VISITS
Deductible	\$250/\$750	\$1000/\$3000	\$5000/\$10000 \$0 With GAP*	
Deductible Included in Out of Pocket Max	YES		YES	
Co-Insurance	100%	50%	80%	50%
Maximum Out of Pocket	\$3000/\$6000	\$6000/\$12000	\$6350/\$12700 \$0 With GAP*	\$10000/\$20000 \$0 With GAP*
Out of Pocket Includes	DED, CO-PAY & CO-INS		DED, CO-PAY, CO-INS & RX	
Prescription	Retail: \$100 DED & 50% In-Net Mail Order: \$20/50/80		\$100 RX DED & \$10/\$60/\$100	50%
Lifetime Maximum	UNLIMITED		UNLIMITED	
Premium Breakdown	Current	Negotiated		Plan w/GAP
Comments		INCREASE 24.20%		INCREASE 7.32%
Monthly Total		\$248,362.19		\$215,005.09

Cost Savings Example 2

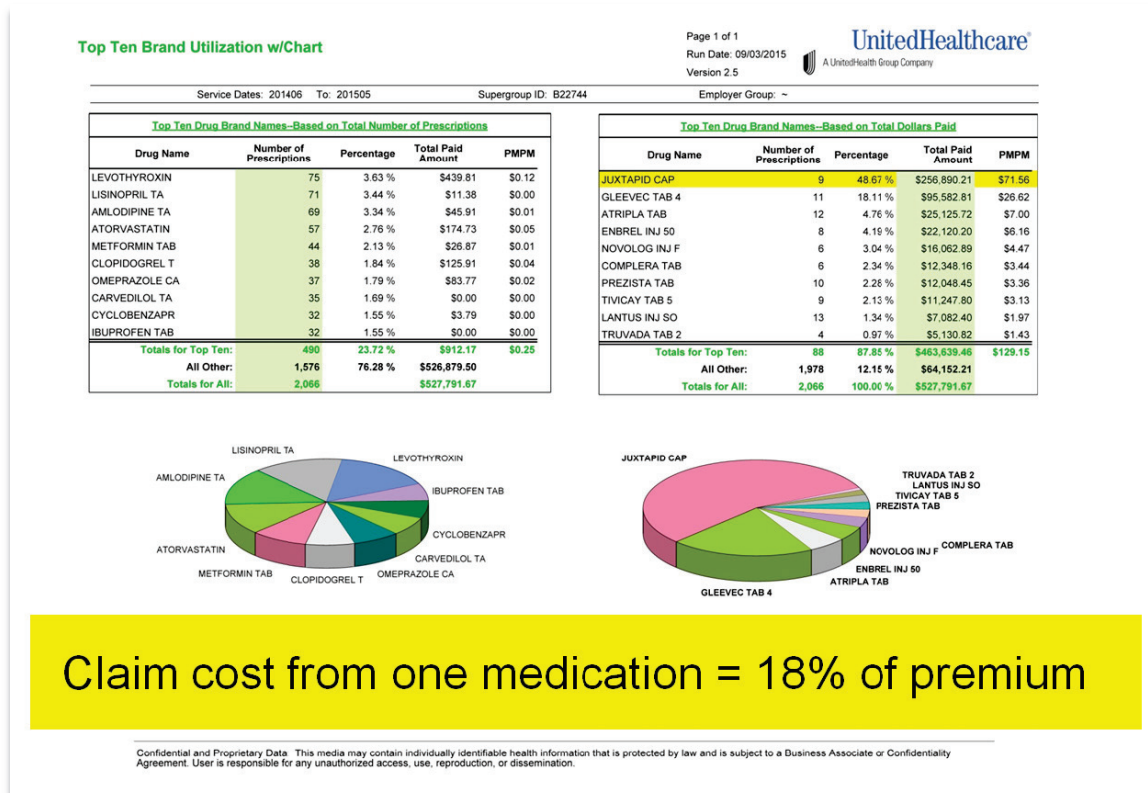
Proactive approach to cost containment produced annual savings of \$246,000

A great deal of attention is being focused nationally on prescription drugs because of concerns about rising costs and lack of coverage in select populations. Spending on prescription drugs continues to be an important healthcare concern, particularly in light of **rising pharmaceutical costs**, the **aging population**, and increased use of costly **specialty drugs**.

In recent history, increases in prescription drug costs have outpaced other categories of healthcare spending. In fact, drug prices rose three times faster than inflation over the last decade.

This client scenario is an example of our team's ability to analyze data, understand it and **provide solutions that benefit the employee and the employer**. In reviewing a claims report, a Sapoznik Benefits Consultant noticed an unusually high RX cost – 18% of the total premium. Upon further examination, the Benefits Consultant investigated options for substituting the medication. He uncovered that the employee was taking it in pill form and there was an injectable option. The cost of the medication (pill to injectable) went from \$330,000/year to \$84,000/year – for an **annual savings of \$246,000!**

To incentivize the member and create a true win-win situation, the Benefits Consultant then negotiated with the insurance carrier so that they would cover the cost of the medication in injectable form at 100% so the **member's cost went to \$0**. This exemplifies our proactive approach to managing our client's benefits program and always looking for opportunities to contain costs.



EDUCATION

We strongly believe in the **power of education** and keeping abreast of the latest tools, regulations, and market trends. We provide this either from our company or through our partners. The following is a representative array of the guidance and consultation we provide:

- Monthly and quarterly benefits newsletters
- Benchmarking information
- Quarterly webinars/seminars on hot topics impacting employers
- Educational videos
- Monthly wellness newsletters
- Compliance tools: bulletins, up-to-date forms, and checklists
- Regulatory and legislative bulletins

Our team will accommodate all City of Opa-locka needs to ensure that we are reaching your employee population in the most effective manner.

For example:

“Hospital spending is one of the biggest drivers of the rising health care costs in the U.S.”

Therefore, an educational campaign for healthcare consumerism is important. Cost comparing through FloridaHealthFinder.gov for hospitals, physicians, ambulatory surgery centers, and more. This site provides a quality report card, care bundle pricing, and information on success of procedures.

Access the website by visiting FloridaHealthFinder.gov or put your phone camera on the below code.



FloridaHealthFinder.gov



a service of the Agency for Health Care Administration

Please see samples of educational campaigns on the following pages.

Live Well, Work Well Monthly Newsletter



Live Well, Work Well

July 2021

Brought to you by City of Opa-locka

EWG's 2021 Dirty Dozen List Is Here

Nearly 70% of non-organic produce sold in the United States contains pesticide residue, according to the Environmental Working Group (EWG). Every year, the EWG ranks pesticide residue levels of fruits and vegetables based on samples taken by the U.S. Department of Agriculture and the Food and Drug Administration, publishing the results in the [Shopper's Guide to Pesticides in Produce](#).

Included in the report is a list of the most pesticide-tainted produce, which is known as the "Dirty Dozen." For 2021, the following were on this list:

1. Strawberries
2. Spinach
3. Kale, collard and mustard greens
4. Nectarines
5. Apples
6. Grapes
7. Cherries
8. Peaches
9. Pears
10. Bell and hot peppers
11. Celery
12. Tomatoes

This article is intended for informational purposes only and is not intended to be a substitute for professional advice. If you have any questions or concerns, please consult a health professional for appropriate advice. © 2021 Sapoznik, Inc. All rights reserved.

In addition to the Dirty Dozen, the EWG publishes the "Clean Fifteen," highlighting the "cleanest" produce. For 2021, avocados and sweet corn topped the list.

What Can You Do?

Most Americans aren't eating enough fruits and vegetables daily. Don't let the Dirty Dozen scare you away from eating fruits and veggies—all properly handled fresh produce, whether organic or not, is believed to be safe to eat.

Only **1 in 10 adults** eat enough fruits and vegetables each day, according to the Centers for Disease Control and Prevention.



To remove any pesticide residue, simply wash your fresh produce under running tap water for 30 seconds. If you're still uneasy about pesticides, buy the frozen or canned versions of your favorite produce as an alternative option. Frozen fruits and vegetables are just as nutritious for you, so find what works best for your household.

If you have any questions or concerns, talk to your doctor.



Summer Picnic Safety Tips

One of the best ways to celebrate summer is to get outside and enjoy good food with friends and family. As nationwide COVID-19 cases decline, COVID-19 vaccination rates increase, and states relax their COVID-19 restrictions, picnics and barbecues will likely be a summertime staple this year.

However, if you aren't careful about handling foods during these cookouts, you're putting yourself and others at risk for potential food-related illnesses. Stay safe with these simple tips:

- Wash cooking equipment, dishes and utensils between uses. Be sure to clean the grill's surface after each use and to wash cutting boards that had raw meat on them.
- Store all perishables in a cooler with ice on top, not just underneath. Use one cooler for drinks and another for food. Never eat anything that has been left out of a refrigerator or cooler for more than two hours.
- Invest in a meat thermometer so you can make sure all meat is cooked to the proper internal temperature.

Warmer temperatures require extra attention to food safety when cooking and eating outdoors. Visit [FoodSafety.gov](#) to learn more about food safety practices.

Pack the Perfect Picnic

Whether you're packing a basket for the park, a hike or your backyard, consider including these healthy and portable foods:

Fresh cheese and cured meats | **Vegetables and hummus**

Mason jar salads



Leave Your Shoes at the Door

You may be tracking disease-causing germs into your home if you regularly keep your shoes on inside. Research found that the outside of your shoes can be a carrier for viruses and bacteria, including E. coli.

Although this level of contamination is a low health threat for most healthy adults, you can reduce the unnecessary spread of germs in your living space by:

- Taking off your shoes at the door
- Washing your hands immediately if you removed your shoes with your hands
- Cleaning your shoes according to the manufacturer's instructions

In general, regardless if it's your home or someone else's place, it's important to remove shoes if there are young children crawling on floors or people in the home whose immune systems are compromised. When in doubt, ask the host if you should take off your shoes.

Avocado and Corn Salsa

Makes: 5 servings

Ingredients

- 1 avocado (diced)
- ¾ cup frozen corn kernels (thawed)
- ¾ cup grape tomatoes (quartered)
- 1 Tbsp. fresh cilantro (chopped)
- 2 tsp. lime juice
- ¼ tsp. salt

Preparations

- 1) Toss avocado, corn, tomatoes, cilantro, lime juice and salt in a medium bowl.
- 2) Chill one hour, and then serve.

Nutritional Information

(per serving)

Total calories	67
Total fat	4 g
Protein	1 g
Sodium	119 mg
Carbohydrate	8 g
Dietary fiber	3 g
Saturated fat	1 g
Total sugars	1 g

Source: MyPlate

Employee Educational flyer

Eat Well, Live Well: Recipe Book

WHERE TO GO FOR CARE

Getting care at the best place for your condition could save you money on your out-of-pocket costs. See your primary care physician (PCP) or family doctor first. If seeing your PCP isn't possible, it's important to know your quick care options, especially before heading to an ER.

Compare quick care options to help keep costs down.



	PCP	Virtual Visits	Convenience Care	Urgent Care	Emergency Room
	Care from the doctor who knows you best	See a doctor whenever, wherever	Basic Conditions that aren't life-threatening	Serious Conditions that aren't life-threatening	Life and limb-threatening emergencies
Average Cost	Varies by plan type	less than \$50	\$90	\$170	\$2,000
✓ Indicates the recommended place for care for the following conditions:					
Broken Bones				✓	✓
Chest Pain					✓
Cough	✓	✓	✓		
Fever	✓	✓	✓		
Muscle Strain	✓		✓		
Pinkeye	✓	✓	✓		
Shortness of Breath					✓
Sinus Problems	✓	✓	✓		
Sore Throat	✓	✓	✓		
Sprain	✓		✓	✓	
Urinary Tract Infection	✓	✓	✓		

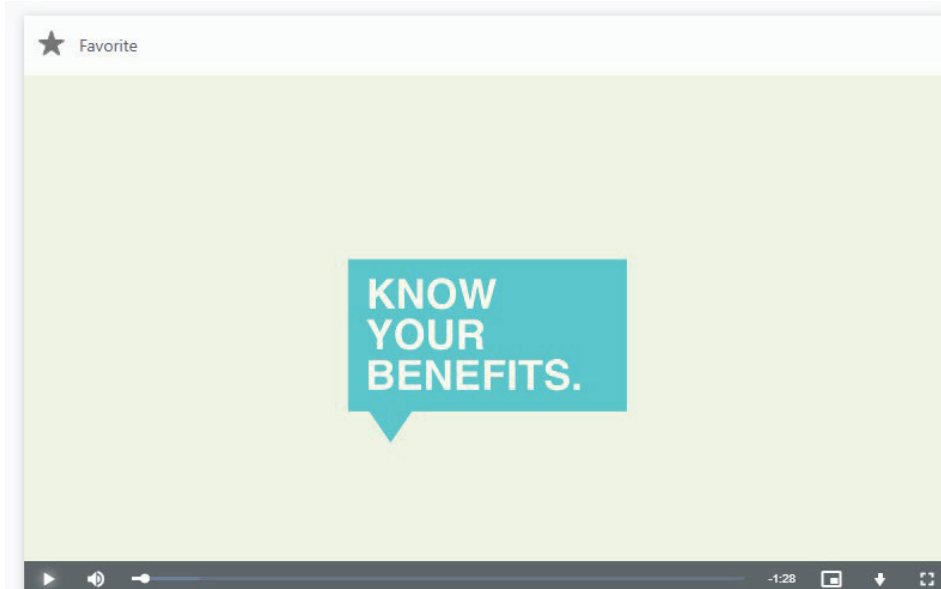
Call 911 or go to an emergency room (ER) if you have a life-threatening condition

Eat Well, Live Well

Recipe Book



Educational Videos – Choosing the right Healthcare Provider Video



Regulatory and legislative bulletins

HRInsights

Brought to you by the insurance professionals at **sapoznik**

5 HR Trends to Monitor in 2020

HR departments are given more and more responsibility each year, often times with budgets that don't match. The reason for this is that HR departments are seen as a cost center and not as a value driver. To that end, here are five of the HR trends to watch for in 2020. When reviewing them, consider how your organization may benefit by implementing similar strategies.

- 1. Employee personalization**
Employees don't want to be seen as a number. They want to be recognized for the unique value each brings to the organization. This requires a personalizing approach to HR.
- 2. Workplace flexibility**
Companies are starting to offer more personalized benefits and services. Instead of offering one-size-fits-all benefits, companies are starting to offer more personalized benefits and services. This allows the employee to choose the benefits and services that best fit their needs.
- 3. Employee development**
Employees are looking for more than just a job. They are looking for a career. This means that companies need to invest in employee development. This can be done through training, mentorship, and other programs.
- 4. Employee engagement**
Employees want to feel like they are part of the team. This means that companies need to focus on employee engagement. This can be done through communication, recognition, and other programs.
- 5. Employee retention**
Companies are looking for ways to keep their best talent. This means that companies need to focus on employee retention. This can be done through competitive compensation, benefits, and other programs.

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RISK INSIGHTS

Reopening a Business After the Coronavirus Shutdown

As the coronavirus (COVID-19) pandemic continues to have an unprecedented effect on daily life, many businesses are looking to the future and are re-evaluating their operations. However, when it comes to reopening a business, there are many factors to consider. This bulletin provides a guide to help businesses prepare for reopening.

- 1. Understand the local and state requirements**
Each state and local government has its own set of requirements for reopening. It is important to understand these requirements and to follow them closely.
- 2. Develop a reopening plan**
A reopening plan should be developed that outlines the steps to be taken to safely reopen the business. This plan should include information on how to manage the flow of traffic, how to maintain social distancing, and how to ensure the safety of employees and customers.
- 3. Communicate with employees and customers**
It is important to communicate with employees and customers about the reopening process. Employees should be informed of the new requirements and procedures. Customers should be informed of the changes to the business's hours and services.
- 4. Monitor the situation**
The situation is constantly changing. It is important to monitor the situation and to be prepared to make adjustments as needed.

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HR COMPLIANCE BULLETIN

Coronavirus and the Workplace – Compliance Issues for Employers

As the number of reported cases of the novel coronavirus (COVID-19) continues to rise, employers are increasingly confronted with the possibility of an outbreak in the workplace. This bulletin provides a guide to help employers understand the compliance issues that may arise.

- 1. Understand the local and state requirements**
Each state and local government has its own set of requirements for dealing with COVID-19. It is important to understand these requirements and to follow them closely.
- 2. Develop a COVID-19 response plan**
A COVID-19 response plan should be developed that outlines the steps to be taken in the event of an outbreak. This plan should include information on how to manage the flow of traffic, how to maintain social distancing, and how to ensure the safety of employees and customers.
- 3. Communicate with employees and customers**
It is important to communicate with employees and customers about the COVID-19 situation. Employees should be informed of the new requirements and procedures. Customers should be informed of the changes to the business's hours and services.
- 4. Monitor the situation**
The situation is constantly changing. It is important to monitor the situation and to be prepared to make adjustments as needed.

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BENEFITS

IRS Allows HDBPs to Cover COVID-19 Costs

The IRS recently issued [Notice 2020-18](#) to allow that high deductible health plans (HDBPs) can pay for coronavirus disease 2019 (COVID-19) testing and treatment before plan deductibles are met. Self-funded plans may also voluntarily waive their cost-sharing for COVID-19 testing and treatment. This bulletin provides a guide to help employers understand the IRS's new guidance.

- 1. Understand the IRS's new guidance**
The IRS has issued Notice 2020-18, which allows HDBPs to cover COVID-19 testing and treatment before plan deductibles are met. Self-funded plans may also voluntarily waive their cost-sharing for COVID-19 testing and treatment.
- 2. Develop a COVID-19 response plan**
A COVID-19 response plan should be developed that outlines the steps to be taken in the event of an outbreak. This plan should include information on how to manage the flow of traffic, how to maintain social distancing, and how to ensure the safety of employees and customers.
- 3. Communicate with employees and customers**
It is important to communicate with employees and customers about the COVID-19 situation. Employees should be informed of the new requirements and procedures. Customers should be informed of the changes to the business's hours and services.
- 4. Monitor the situation**
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COMPLIANCE BULLETIN

CARES Act Makes Changes for Health Plans

On March 27, 2020, President Trump signed the [Coronavirus Aid, Relief, and Economic Security \(CARES\) Act](#). This act includes a variety of changes affecting health plans. This bulletin provides a guide to help employers understand the CARES Act's new provisions.

- 1. Understand the CARES Act's new provisions**
The CARES Act includes a variety of changes affecting health plans. These changes include:
 - Expanding the types of coronavirus testing that all health plans and health insurance must cover without cost sharing (such as deductibles, copayments, or coinsurance) or prior authorization.
 - Accelerating the process that will require health plans and insurers to cover preventive services and services related to COVID-19.
 - Allowing telehealth and other remote care services to be covered under a high deductible health plan (HDHP) before the deductible is met, without affecting the HDHP's compatibility with health savings accounts (HSAs) established for 2019 plan years beginning on or before Dec. 31, 2020, and
 - Testing over-the-counter (OTC) medications, along with medical care products, as qualified medical expenses that may be paid for using HSAs or other tax-advantaged accounts, such as health flexible spending accounts (FSAs) or health reimbursement accounts (HRAs).
- 2. Develop a COVID-19 response plan**
A COVID-19 response plan should be developed that outlines the steps to be taken in the event of an outbreak. This plan should include information on how to manage the flow of traffic, how to maintain social distancing, and how to ensure the safety of employees and customers.
- 3. Communicate with employees and customers**
It is important to communicate with employees and customers about the COVID-19 situation. Employees should be informed of the new requirements and procedures. Customers should be informed of the changes to the business's hours and services.
- 4. Monitor the situation**
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LEGAL UPDATE

Coronavirus Bill Requiring Paid Employee Leave Signed Into Law

On March 18, 2020, President Trump signed the [Coronavirus Aid, Relief, and Economic Security \(CARES\) Act](#). This act includes a variety of changes affecting health plans. This bulletin provides a guide to help employers understand the CARES Act's new provisions.

- 1. Understand the CARES Act's new provisions**
The CARES Act includes a variety of changes affecting health plans. These changes include:
 - Expanding the types of coronavirus testing that all health plans and health insurance must cover without cost sharing (such as deductibles, copayments, or coinsurance) or prior authorization.
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ACA OVERVIEW

2020 Compliance Checklist

The Affordable Care Act (ACA) has made a number of significant changes to group health plans since the law was enacted in 2010. Many of these changes became effective in 2014 and 2015, including health plan design changes, increased wellness program incentives, and the employer shared responsibility provisions. This bulletin provides a guide to help employers understand the ACA's new provisions.

- 1. Understand the ACA's new provisions**
The ACA includes a variety of changes affecting health plans. These changes include:
 - Expanding the types of coronavirus testing that all health plans and health insurance must cover without cost sharing (such as deductibles, copayments, or coinsurance) or prior authorization.
 - Accelerating the process that will require health plans and insurers to cover preventive services and services related to COVID-19.
 - Allowing telehealth and other remote care services to be covered under a high deductible health plan (HDHP) before the deductible is met, without affecting the HDHP's compatibility with health savings accounts (HSAs) established for 2019 plan years beginning on or before Dec. 31, 2020, and
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DOL AUDIT GUIDE

Employee Benefit Plans

The Department of Labor (DOL) has issued a new audit guide for employee benefit plans. This guide provides a guide to help employers understand the DOL's new audit guide.

- 1. Understand the DOL's new audit guide**
The DOL has issued a new audit guide for employee benefit plans. This guide provides a guide to help employers understand the DOL's new audit guide.
- 2. Develop a COVID-19 response plan**
A COVID-19 response plan should be developed that outlines the steps to be taken in the event of an outbreak. This plan should include information on how to manage the flow of traffic, how to maintain social distancing, and how to ensure the safety of employees and customers.
- 3. Communicate with employees and customers**
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LEGAL UPDATE

Florida Minimum Wage Will Rise Gradually to \$15 per hour

On Jan. 1, 2020, the state of Florida approved a gradual increase in the state's minimum wage rate. This bulletin provides a guide to help employers understand the Florida's new minimum wage rate.

Effective Date	New Minimum Wage Rate	Typical Employer Wage
Jan. 1, 2020	\$8.65 per hour	\$9.50 per hour
Jan. 1, 2021	\$9.09 per hour	\$9.50 per hour
Jan. 1, 2022	\$9.53 per hour	\$9.50 per hour
Jan. 1, 2023	\$9.97 per hour	\$9.50 per hour
Jan. 1, 2024	\$10.41 per hour	\$9.50 per hour
Jan. 1, 2025	\$10.85 per hour	\$9.50 per hour
Jan. 1, 2026	\$11.29 per hour	\$9.50 per hour
Jan. 1, 2027	\$11.73 per hour	\$9.50 per hour
Jan. 1, 2028	\$12.17 per hour	\$9.50 per hour
Jan. 1, 2029	\$12.61 per hour	\$9.50 per hour
Jan. 1, 2030	\$13.05 per hour	\$9.50 per hour
Jan. 1, 2031	\$13.49 per hour	\$9.50 per hour
Jan. 1, 2032	\$13.93 per hour	\$9.50 per hour
Jan. 1, 2033	\$14.37 per hour	\$9.50 per hour
Jan. 1, 2034	\$14.81 per hour	\$9.50 per hour
Jan. 1, 2035	\$15.25 per hour	\$9.50 per hour
Jan. 1, 2036	\$15.69 per hour	\$9.50 per hour
Jan. 1, 2037	\$16.13 per hour	\$9.50 per hour
Jan. 1, 2038	\$16.57 per hour	\$9.50 per hour
Jan. 1, 2039	\$17.01 per hour	\$9.50 per hour
Jan. 1, 2040	\$17.45 per hour	\$9.50 per hour
Jan. 1, 2041	\$17.89 per hour	\$9.50 per hour
Jan. 1, 2042	\$18.33 per hour	\$9.50 per hour
Jan. 1, 2043	\$18.77 per hour	\$9.50 per hour
Jan. 1, 2044	\$19.21 per hour	\$9.50 per hour
Jan. 1, 2045	\$19.65 per hour	\$9.50 per hour
Jan. 1, 2046	\$20.09 per hour	\$9.50 per hour
Jan. 1, 2047	\$20.53 per hour	\$9.50 per hour
Jan. 1, 2048	\$20.97 per hour	\$9.50 per hour
Jan. 1, 2049	\$21.41 per hour	\$9.50 per hour
Jan. 1, 2050	\$21.85 per hour	\$9.50 per hour
Jan. 1, 2051	\$22.29 per hour	\$9.50 per hour
Jan. 1, 2052	\$22.73 per hour	\$9.50 per hour
Jan. 1, 2053	\$23.17 per hour	\$9.50 per hour
Jan. 1, 2054	\$23.61 per hour	\$9.50 per hour
Jan. 1, 2055	\$24.05 per hour	\$9.50 per hour
Jan. 1, 2056	\$24.49 per hour	\$9.50 per hour
Jan. 1, 2057	\$24.93 per hour	\$9.50 per hour
Jan. 1, 2058	\$25.37 per hour	\$9.50 per hour
Jan. 1, 2059	\$25.81 per hour	\$9.50 per hour
Jan. 1, 2060	\$26.25 per hour	\$9.50 per hour
Jan. 1, 2061	\$26.69 per hour	\$9.50 per hour
Jan. 1, 2062	\$27.13 per hour	\$9.50 per hour
Jan. 1, 2063	\$27.57 per hour	\$9.50 per hour
Jan. 1, 2064	\$28.01 per hour	\$9.50 per hour
Jan. 1, 2065	\$28.45 per hour	\$9.50 per hour
Jan. 1, 2066	\$28.89 per hour	\$9.50 per hour
Jan. 1, 2067	\$29.33 per hour	\$9.50 per hour
Jan. 1, 2068	\$29.77 per hour	\$9.50 per hour
Jan. 1, 2069	\$30.21 per hour	\$9.50 per hour
Jan. 1, 2070	\$30.65 per hour	\$9.50 per hour
Jan. 1, 2071	\$31.09 per hour	\$9.50 per hour
Jan. 1, 2072	\$31.53 per hour	\$9.50 per hour
Jan. 1, 2073	\$31.97 per hour	\$9.50 per hour
Jan. 1, 2074	\$32.41 per hour	\$9.50 per hour
Jan. 1, 2075	\$32.85 per hour	\$9.50 per hour
Jan. 1, 2076	\$33.29 per hour	\$9.50 per hour
Jan. 1, 2077	\$33.73 per hour	\$9.50 per hour
Jan. 1, 2078	\$34.17 per hour	\$9.50 per hour
Jan. 1, 2079	\$34.61 per hour	\$9.50 per hour
Jan. 1, 2080	\$35.05 per hour	\$9.50 per hour
Jan. 1, 2081	\$35.49 per hour	\$9.50 per hour
Jan. 1, 2082	\$35.93 per hour	\$9.50 per hour
Jan. 1, 2083	\$36.37 per hour	\$9.50 per hour
Jan. 1, 2084	\$36.81 per hour	\$9.50 per hour
Jan. 1, 2085	\$37.25 per hour	\$9.50 per hour
Jan. 1, 2086	\$37.69 per hour	\$9.50 per hour
Jan. 1, 2087	\$38.13 per hour	\$9.50 per hour
Jan. 1, 2088	\$38.57 per hour	\$9.50 per hour
Jan. 1, 2089	\$39.01 per hour	\$9.50 per hour
Jan. 1, 2090	\$39.45 per hour	\$9.50 per hour
Jan. 1, 2091	\$39.89 per hour	\$9.50 per hour
Jan. 1, 2092	\$40.33 per hour	\$9.50 per hour
Jan. 1, 2093	\$40.77 per hour	\$9.50 per hour
Jan. 1, 2094	\$41.21 per hour	\$9.50 per hour
Jan. 1, 2095	\$41.65 per hour	\$9.50 per hour
Jan. 1, 2096	\$42.09 per hour	\$9.50 per hour
Jan. 1, 2097	\$42.53 per hour	\$9.50 per hour
Jan. 1, 2098	\$42.97 per hour	\$9.50 per hour
Jan. 1, 2099	\$43.41 per hour	\$9.50 per hour
Jan. 1, 2100	\$43.85 per hour	\$9.50 per hour

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OPEN ENROLLMENT

The **open enrollment period** is an important time to have presence and comprehensive support. Sapoznik Insurance believes it is a key opportunity to meet and educate your employees on their benefits. Being a technology-driven broker, we can set up an automated enrollment process, which eliminates the expense and hassle of distributing and collecting paper enrollment forms. However, we understand that with five generations in the workforce, it is critical to have a multi-channel approach.

Your team members can enroll through their preferred channel:



ONE-ON-ONE ENROLLMENTS

In-person session with
a benefits counselor



OVER THE PHONE

With a benefits
counselor



VIDEO CONFERENCE

Via GoToMeeting™ with
a benefits counselor



SELF-ENROLL

Online portal or
mobile app

In addition, we can provide end-to-end enrollment support through technology platforms such as:

Employee Navigator

- Benefits administration and employee communication
 - Streamline the process of enrolling in your benefits and make sure employees stay connected.
 - New hire and open enrollment
 - Defined contribution
 - Decision support
 - Medical, dental, vision
 - Critical illness & accident
 - Life & disability
 - FSA, HSA & transit accounts
 - EOI & COBRA support
- ACA compliance tracking
 - Access eligibility tracking for hourly employees and data collection for 1094/1095 reporting
- Paid time off and vacation tracking
 - Build the perfect PTO policy for your company and allow employees to easily request time-off
- Integrated COBRA and FSA
 - Modernize the data exchange and eliminate the manual process for third-party administrators
- For employees
 - Easy access to HR Information
 - Intuitive benefit enrollment and paperless on-boarding
 - Mobile access

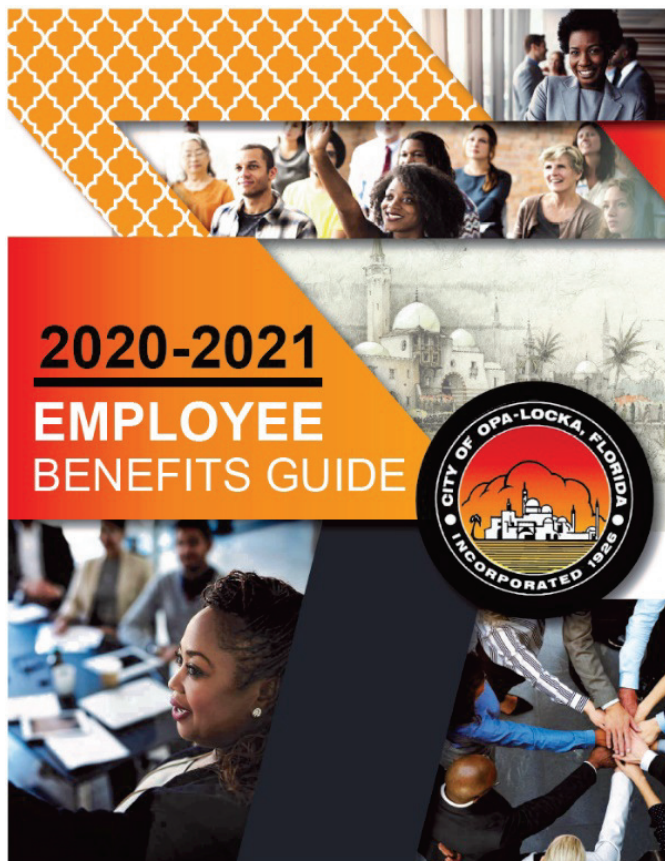


MARKETING AND COMMUNICATIONS

The way that employers communicate benefits information to employees has a tremendous impact on how well the programs are understood, utilized, and perceived. Sapoznik Insurance has a team of **experienced, full-time, in-house marketing and communications specialists**, ensuring that a wide variety of communications tactics across a large span of topics are effectively reaching your employees. We believe that multiple forms of communication tools help us reach, educate, and engage the greatest number of employees.

From customized print materials, digital forms of communication including web-based portals and videos, to in-person educational seminars and one-on-one meetings – Sapoznik has all bases covered.

Please see a sample of our open enrollment materials:



2020-2021

EMPLOYEE BENEFITS ANNUAL ENROLLMENT

CITY OF OPA-LOCKA FLORIDA

WELCOME TO YOUR VIRTUAL ENROLLMENT

Open Enrollment is the time to learn more about your employee benefits & enroll for the 2020-2021 plan year.

This will be **your only time to make changes** until next year's open enrollment, unless you have a qualifying event (such as childbirth, divorce, etc.)

Policy effective date:
October 1, 2020

PARTICIPATION IS MANDATORY

ZOOM MEETINGS Learn about your benefits

Tuesday, Sept. 8th	10:00 AM - 11:00 AM	Join Zoom Meeting https://us02web.zoom.us/j/834451633987 pwd=0E1lbys5SGIBQVJickVNTfVDNVExdz08 Call-In Number: 1 (646) 658-8656
Wednesday, Sept. 9th	10:00 AM - 11:00 AM	Join Zoom Meeting https://us02web.zoom.us/j/897958179237 pwd=c3FIOEtydmZgR0dMXBzeHdaZzBTZz09 Call-In Number: 1 (646) 658-8656

ENROLLING OPTIONS Selecting your benefits

One-On-One Enrollments
 Colonial representative will be on-site for one-on-one enrollments:
Tuesday September 8th and Wednesday, September 9th from 10:00am - 8:00pm.
 Schedule your appointment time by clicking this link: <https://coloniallife.rivs.com/schedule/onsite/>

Call the Enrollment Center (800) 313-7084
 Colonial representative will be available for call center enrollments:
Thursday, September 10th through Monday, September 14th from 9:00am - 5:00pm est.
 Schedule your appointment time by clicking this link: <https://coloniallife.rivs.com/schedule/virtual/>

sapoznik WHERE HEALTH BENEFITS **877.948.8887**

www.sapoznik.com

In today's technology-driven world, there are multiple ways to communicate employee benefits with your workforce. As your partner, in conjunction with your HR team, we will evaluate how your employees prefer to be communicated with and then develop plans to tap into these resources when creating communications. We also offer **customized on-line surveys**, that can be anonymous, which can be used to help us solicit communication preferences and specific areas and topics they would like covered.

All of Sapoznik Insurance's communication and educational pieces are customizable, and we believe that they must be – because there is no one-size-fits-all. We recognize that companies have employees that span different generations, demographics, cultural populations, and geographic locations.

Specifically, for open enrollment, we use a combination of communication methods to ensure every employee has an opportunity to become educated about their benefits and has resources to make the best decisions for their families. Typically, we:

- Create open enrollment posters that can be posted in a physical workspace to announce the open enrollment schedule
- Create an email blast to reiterate the meeting schedule, and includes a memo outlining any plan changes or items we want to highlight
- Circulate a video recording of the benefits package so employees can learn more at their convenience or share the information with their spouse
- Provide printed and digital copies of benefit booklets that include details about each plan that is being offered.
- Post-pandemic sustainability and taking your open enrollments **green!** - Digital Employee Benefit Guides
- Schedule text message blasts to remind employees to attend meetings, enroll in a timely manner, and let them know that we are available if they need assistance



Areas of communication include:

Printed and Marketing Documentation

From one-page printed to full-scale marketing campaigns, Sapoznik can create written and printed documentation to communicate employee group benefits information. This can be very effective because information can quickly be disseminated to all employees at any time of the year. Additionally, written, and printed documentation of benefits information can be edited as benefit plans change.

All written documentation includes access to plan detailed explanation of benefits. We create a set of printed benefits documents for employees that include rate schedules and coverage amounts; and a separate set of documents that are designed to provide basic benefit information to candidates before they are recruited for employment. In an increasingly multi-cultural environment, we also recommend that our clients allow us to create a set of documents that are translated into other languages for ease in communicating benefits to all employees.

Benefit Information Meetings

Whether handled informally or via formal sessions, benefit meetings are an effective way of getting plan information and questions answered quickly. We help your team facilitate the meetings or we can lead them from start-to-finish. We make sure that all new hires can speak with a benefit plan administrator before selecting any benefits for the coming year.



Throughout the year, the Sapoznik team will come on-site to your offices or virtually and be available to schedule meetings with employees, one-on-one, to answer specific questions about how to use their benefits. This can be especially important if there are claims issues. During open enrollment, we make sure that our team is available to conduct meetings that highlight important updates to the benefit plan and encourage more employees to participate in the group offering.

Digital Communication Methods

We live in a world where digital communication has become the norm. Digital communication includes emails, text messaging, instant messaging, mobile apps, your Intranet and more. We use all available methods to get benefit information out to your employees on a regular basis to remind them of all the perks that they have available to them.



Examples include:

- A short video of how to use one of your benefits (example: [7 Tips for Health Care Spending](#))
- A text message blast sent to all employees announcing an upcoming open enrollment meeting
- An email blast about how they can earn rewards by completing their annual physical

Corporate Benefits Portals and Websites

Sapoznik Insurance offers your company a web-based benefit portal that hosts employee benefits information and resources. This is a secure way for the City of Opa-locka to share important benefits information and instructions for enrolling in benefit plans. Benefit websites are encrypted to the highest level possible and designed with a single-sign-on process to protect personal health information and other data, locked behind user credentials.



Social Media Communications

Social media can also be a highly effective way of communicating employee benefits, as well as important updates including information about benefit plans and reminders about programs and activities available to them.



The Sapoznik team will work together with your benefits administrator to create benefits messages that encourage participation in the group plans. We will create content and customized images that can be shared by your team on your social media accounts featuring health and wellness tips, financial responsibility tips, and updates to enrollment periods.

Annual Employee Benefits Statements (Total Compensation Statements)

To make a greater impact when communicating benefits, Sapoznik Insurance helps design an annual statement of total compensation to all employees. This is a document that is organized by salary, benefits, and other perks that the company offers to employees. It is a written document that shows in black and white how much the company is investing in every employee. As evidenced by research, many employees don't realize how much the workplace benefits them - so a total compensation statement can create a meaningful dialogue between you and employees.



Please see sample on the following pages:



TOTAL COMPENSATION STATEMENT

Prepared for:

2021 Benefits Statement

Dear Joe Smith:

This personal benefits statement is a brief outline of the benefits provides to you. It summarizes each benefit and illustrates the significance of your benefits package as part of your total compensation. Please review the information carefully and direct any questions or concerns to Jane Doe at 414-444-5586.

**TOTAL
COMPENSATION:**
\$39,419.18

Personal Information:		Employment Information:	
SSN/Employee ID:	088-88-8888	Date of Hire:	January 1, 2002
Name:	Joe Smith	Annual Base Salary:	\$32,562.00
Address:	800 Langdon St.	Job Title:	Electrician
City, State, Zip	Madison, WI 53706		

Benefit Name:	Benefit Description:	Annual Cost:	
		Employer Cost:	Employee Cost:
Medical	UnitedHealthcare Choice	\$4,684.42	\$ 783.90
Dental	MetLife Dental Plan	\$ 360.88	\$ 226.20
Vision	Vision Service Plan Discount Card	\$ 0.00	\$ 25.00
Employer-provided Short-term Disability	Company Provided STD benefit equal to 60% of your weekly rate for maximum benefit period of 13 weeks	\$ 125.10	\$ 0.00
Employer-provided Long-term Disability	Company provided LTD monthly benefit begins after 90 days of total disability. Benefit equivalent to 70% of basic monthly earnings while disabled up to age 65.	\$ 210.20	\$ 0.00
Employer-provided Basic Life & AD&D	One times salary to maximum benefit of \$100,000	\$ 174.10	\$ 0.00
Voluntary/Supplement Life	No coverage	\$ 0.00	\$ 0.00
Dependent Life	No Coverage	\$ 0.00	\$ 0.00
Voluntary Long-term Care	Base plan covers \$1,000 per month facility for 3 years or \$500 per month homecare for 6 years.	\$ 0.00	\$ 0.00
Health Care Spending Account	2005 Contribution	\$ 0.00	\$ 364.00
Dependent Care Spending Account	Paid Yearly	\$ 0.00	\$5,000.00

Commuter Expense Reimbursement Account	Paid Yearly	\$ 0.00	\$ 800.00
401(k) Plan	Can elect to defer up to 25% of your income pretax. Company match is 50% of withholdings up to 4%.	\$1,302.48	\$2,604.96
Profit sharing	Determined annually by board of directors based on profitability	\$ 0.00	\$ 650.54
Employee Stock Purchase Plan	Shares of company stock can be purchased 2 times annually with a 15% discount (see plan document for more details).	\$ 0.00	\$ 650.54
Total Benefits Cost:		\$6,857.18	\$11,105.14
Plus Annual Base Salary:		\$32,562.00	
TOTAL COMPENSATION:		\$39,419.18	
Cost of employer-sponsored benefits as a percentage of total compensation:		17.40%	

Miscellaneous Benefits:	Benefit Description:
401(k) and Profit Sharing	ABC Co. is pleased to partner with you in providing for your retirement. Our tax-deferred 401(k) plan offers you many advantages over a typical savings account. With a 401 (k) plan, the money you put in the account is tax-deferred. Additionally, the interest you earn on the money in your account grows without having taxes withheld, so the total grows much quicker than it would without this tax advantage.
Bereavement Pay	We have taken into consideration the personal needs which arise from the death of an immediate family member. Up to 5 days off may be granted with pay.
Credit union membership	As an employee you are eligible for membership in the Southeastern State Credit Union. See HR for details.
Direct Deposit	Direct Deposit to your financial institution is available for our convenience. See HR for details.
Employee Assistance Program	An employee assistance program is available for all employees and their families for confidential assistance in dealing with personal concerns.
Paid Holidays	ABC Co. recognizes 10 paid holidays each year, typically: New Year's Day and the day before or after; President's Day; Memorial Day; Independence Day; Labor Day; Thanksgiving Day and the day following; and Christmas Day and the day before or after.
Jury Duty Pay	If you are chosen for jury duty you will be provided with your regular pay minus any compensation from the court for up to 10 working days.
Onsite Child Care	Contact Great Kids at (800) 555-5555 for information.
Severance Pay	Negotiated upon hire.
Paid Sick Days	Our sick leave policy is established to assist you when you are unable to work due to illness, injury, or a medical condition.
Tuition Reimbursement	100% reimbursement of tuition and course-required books for classes pertinent to present position or next logical step. Course must be from accredited school, college or university. Reimbursement not to exceed \$1500 annually.
Uniform Expense	\$200 annually is allowed for purchase of uniforms.
Vacation	Each employee earns 10 days of vacation in the first year of employment. One vacation day is added for each additional year of employment up to a maximum of 25 days per year.
Voting Leave	ABC Co. provides up to 2 hours to vote in both the primary and general elections held each year.
Wellness Program	Up to \$100 annually for eligible wellness classes, health club membership or weight loss program. See HR for program details.

Please contact Human Resources with questions or comments about your personal benefits summary. is pleased to be able to offer these valuable benefits to you, and we thank you for being a partner in our success.

COMPLIANCE

There are countless rules and regulations governing employee benefit plans, many of which are complex. Our resources will help you meet your compliance obligations and keep you up to date on laws and regulations that affect your employee benefits program. We provide:

- Compliance Bulletins, Compliance Overviews, and newsletters
- Education on plan design
- Step-by-step breakdowns and guidance on State and Federal benefits laws
- ACA interactive tools
- In person training as necessary
- Access to compliance seminars and webinars
- Work with the carriers to prepare and distribute SPDs
- Our materials cover healthcare reform, **COBRA, HIPAA, FMLA, Medicare Part D, ADA, State-specific legislation** and more. We also have full access to **ERISA** attorneys.

The Affordable Care Act (ACA) has created an unprecedented environment of compliance complexity. In effect, the ACA has rewritten the rules of U.S. workforce management—transforming what was once an annual enrollment event into a monthly process of tracking and reporting. Moreover, noncompliance carries the potential of devastating penalties. The truth is the ACA impacts every element of an organization from HR, benefits, payroll, IT and legal, to the CFO. Under the ACA, having the ability to consult with true partners and analyze data is more important than ever.

Additionally, after an extensive review of technology platforms, we have a **fully customized online technology platform to track and report ACA compliance** on behalf of the City of Opa-locka. We will also take on most of the plan implementation and maintenance responsibilities to reduce the burden on the human resources team.

Sapoznik Insurance has many sources to provide information that ensures we are current with all legislation, compliance, trends and new products and services. Our primary sources are Zywave and ThinkHR – both are industry-leading solutions platforms for benefit brokers.

As your trusted advisor, we understand your struggles and are committed to innovative and supportive solutions that help you manage your business and not get bogged down by complex compliance concerns or human resource issues.



Our partner, who stores our data, Zywave®, has successfully implemented administrative, physical, and technical safeguards throughout its organization to ensure that its use and disclosure of protected health information (PHI) and electronic protected health information (ePHI) complies with the requirements set by the Health Insurance Portability and Accountability Act (HIPAA).

Because compliance is an ongoing process, Zywave continually devotes resources to reviewing and improving its business practices and policies to ensure the protection of all confidential information entrusted to it. As part of its compliance program, Zywave requires all employees to attend training on Zywave's privacy policies. All storage at rest, regardless of the product, is encrypted with AES 256-bit encryption, and all data publicly transmitted is encrypted using the TLS protocol.

Our partnership with ThinkHR provides you:



- Real-time expert HR and compliance support - unlimited, immediate access to certified, experienced advisors to help navigate your people risk management issues.
- Fully integrated content combined with expert analysis of employment laws and regulations and best practice information to help you handle current issues and to better understand how to prepare for future issues.
- Team of attorneys and experts monitor and anticipate future challenges and prepare you through email and CE accredited webinars.
- Updated handbook - The industry's only wizard-based handbook tool covering all 50 states, complete with policy change alerts to ensure your handbook is always up-to-date, accurate, and protecting your business as effectively as possible.
- Training - Whether you train because you have to or because it is just a really good idea, we've got you covered with a full-featured learning management system with the industry's most comprehensive unlimited training catalog.
- Thousands of templates, tools, checklists, and policies to make your job easier. Resources include FLSA classification, performance management, salary benchmarking, interactive audits, job description builder, and more.



IN-HOUSE WELLNESS DEPARTMENT

The **customized educational materials** we provide can do everything from helping employees understand their healthcare needs to making healthy lifestyle changes. Helping employees understand the benefits that are available and make educated decisions about which benefits are right for them, allows them more to say in their healthcare, and saves you money.

Employees educated on the importance of preventive care may be less likely to rack up hospital bills resulting from leaving conditions untreated. Employees with large families and frequent doctor visits may choose a health plan with broader coverage than employees who live alone and visit the doctor infrequently.

Sapoznik Insurance is committed to helping the City of Opa-locka implement personalized corporate wellness programs which will reduce healthcare costs and increase employee productivity and satisfaction. After conducting a study of your population (surveys and/or face-to-face interviews with management and employees), we design a wellness program specific to the City, and provide access to quality health and wellness services that meet the essential employee needs.

Save time, money, and potential liability without hindering staff. Sapoznik's turnkey wellness solution will help change health behaviors of employees, spouses, and dependents.

Our program:

- Aligns with the company culture and builds employee engagement
- Engages employees in a healthy lifestyle, on and off the job
- Increases productivity and decreases turnover
- Lowers health risks and reduces chronic disease
- Assesses compliance with state and federal regulations
- Provides employees with tools to become more educated healthcare consumers
- Measures wellness initiatives and compares data year-over-year
- Can help lower insurance premiums and healthcare costs
- Creates an overall culture of wellness

To allow the City of Opa-locka's HR department to stay focused, Sapoznik assumes a boots-on-the-ground approach. We invest the time, resources and expertise to design and execute a highly personalized employee focused wellness strategy - from building an annual calendar based on the needs of the population, to comprehensive marketing campaigns for each event, to collecting feedback from the employees immediately after events, and meeting with management quarterly or semiannually to review and evaluate results and modify the program if necessary.

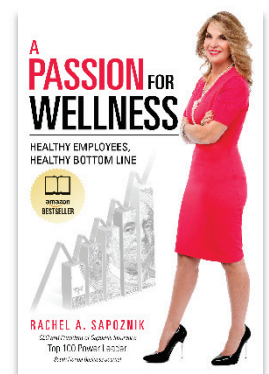
Sapoznik will include elements from each of the following engagement drivers:

- Leverage every tool from your health insurance carrier
- Integrated health risk assessments
- Biometric screenings

Compliment carrier offerings with:

- Nutrition education and plans (vending machine assessment, deliver healthy meals, etc.)
- Fitness programs for all levels
- Rewards based activities and challenges
- Individual and group health coaching
- Meditation, mindfulness, and mental health initiatives
- Dashboards, reports and aggregate health risk data (please see sample dashboard on following page)

What makes our wellness program unique is our "boots on the ground" approach ensuring that everyone is engaged. We communicate with our clients, and their employees and respective dependents, keeping them informed of their progress every step of the way. Led by our President who shares her passion for wellness, we focus on all aspects of well-being, and because our programs are so highly customized, we appeal to all employees. We create innovative wellness programs that people love, and as a result they remain committed throughout the entire wellness journey. Our wellness programs are a recruiting and retaining tool, making a difference when an employee considers taking another job. We serve thousands of associates and we remember their names! We don't look at it as "just" a wellness program. We design a program that is focused on behavior change. We anticipate the employees' needs and as a result we deliver creative solutions.



Since wellness is an evolving concept in organizations, it is important to point out the legal ramifications that are also evolving. Having a third party that works synergistically with any insurance carrier will help safeguard a company from liability issues that revolve around HIPAA, ACA, ADA, GINA and ERISA. Lastly, Sapoznik understands the importance of data. We review and analyze claims, health risk data and identify specific areas that impact employees' health as well as the City of Opa-locka bottom line.

Additionally, we conduct campaigns and reach out to employees using all means of communication: payroll stuffers, posters, employee newsletters, and educational flyers on health and wellness, designed to help the City of Opa-locka drive consumerism in your workplace.

On the following pages, please see dashboard report, event flyers, and employee comments from surveys conducted.

REPORT TO DATE

2017-2020



CITY OF
OPA-LOCKA
FLORIDA

RATE COMPARISON	2017	2018	2019	2020
Medical	2%	4%	-7.18%	-7.39%
Dental	Rate pass	Rate pass	Rate pass	Rate pass
Vision	Rate pass	Rate pass	Rate pass	Rate pass
Life	10%	Rate pass	Rate pass	Rate pass
STD	Rate pass	Rate pass	Rate pass	Rate pass
LTD	Rate pass	Rate pass	Rate pass	Rate pass

143
Employees
Enrolled



**4-YEAR NEGOTIATED
PREMIUM SAVINGS**

\$605,821

**EMPLOYEE SAVINGS ON
CLAIMS WE MANAGED**

\$24,820

AUDITS	TERMINATIONS/ENROLLMENTS
48	210

RECENT TRENDS

- In 2019, 298 million people in the United States had some sort of health insurance. ¹
- 46% of the employees who selected insurance benefits said that their dental insurance benefit reduces their financial stress. ²
- In 2020, the average deductible cost for an individual was 1,644 U.S. dollars. ³

¹ <https://www.statista.com/statistics/200946/americans-with-health-insurance/>

² <https://www.statista.com/statistics/665570/benefits-employees-expect-usa/>

³ <https://www.statista.com/statistics/186001/annual-deductibles-of-hdhp-and-so-employer-health-insurance/>



WELLNESS DAY

DATE: Wednesday, July 10
TIME: 11:00 AM - 2:00 PM
LOCATION: Suite 335

RELAXATION
Chair Massage
Stretching Station

FINANCIAL INFO
Educational Information

SCREENINGS
Glucose
Blood pressure
Total Cholesterol
BMI Chart Info
Back Screening
Skin Screening

SNACKS & PRIZES!!!

sapoznik.
WHERE HEALTH BENEFITS

www.sapoznik.com
877.948.8887



AvMed Embrace better health.

WELLNESS INITIATIVES

DATE: TUESDAY MARCH 27, 2018
LOCATION: 780 Fisherman Street
3rd Floor - Suite 335
Opa-locka, Florida 33054
TIME: 12:00 PM - 1:00 PM
LUNCH WILL BE PROVIDED

LET'S GET STARTED!

At AvMed, we believe living healthy is about having a positive perspective, a resilient spirit, and a support system that encourages you to keep heading in a healthy direction every mile you run, bike ride you take, full night you sleep, or vegetable you eat. That's why we're proud to offer wellness plan that fit your needs and the needs of your family, and all the resources you need to help you embrace better health every day at home, at work, or wherever life takes you.

AvMed's Weight Watchers Reimbursement Program
AvMed's Personal Health Assessment (PHA) Challenge
AvMed Gym Discount program

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WHERE HEALTH BENEFITS
www.sapoznik.com
877.948.8887

← Messages City of Opa-locka Details

How did you like the City's **Wellness day**?

Very informative, and the information provided was very useful information regarding health.

Good intentions (assistance) for helping employees to get healthy

Good resources & Info

Great event!

Text message Send

← Messages City of Opa-locka Details

How was **AvMed's Wellness Presentation**?

Variety of useful services are available, please make sure they are mentioned during open enrollment.

Very informative, learned things about plan that I didn't use.

They informed me of the many offers that we have that I did not know of.

I would like to see more events like this to bring awareness

Text message Send



FINANCIAL WELLNESS

**DATE: WEDNESDAY
JUNE 20, 2018**

LOCATION:
780 Fisherman Street
3rd Floor - Suite 335
Opa-locka, Florida 33054

TIME:
12:00 PM - 1:00 PM

- FINANCE 101
BUDGETING & SPENDING
- FINANCE 102
DEBT & CREDIT
- FINANCE 103
INVESTMENTS & SAVINGS

JOIN US!

Wells Fargo will be conducting a seminar on being a first time home buyer. Learn how to buy in today's market, the steps in the home buying process, how to identify the costs associated with buying a home, and the types of financing available.

LUNCH WILL BE PROVIDED!

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< Messages City of Opa-locka Details

Financial Seminar on Budgeting?

Very relatable and efficient in explaining financial process and proving information

A lot of valuable info & recommendations

Lovely presentation - great having PowerPoint presentation on paper to follow along with.

Text message Send

< Messages City of Opa-locka Details

Financial Seminar on Credit?

Brought up different aspects of credit I was not aware of.

She was very knowledgeable of everything on the slides

Informative 70/30 rule.

Text message Send

< Messages City of Opa-locka Details

Financial Seminar on Home Buying?

Informative, more information than most other places.

Very informative. Revealed stuff I didn't know.

Text message Send

BREAST CANCER AWARENESS & FLU VACCINE



**JOIN US!
WEAR PINK**

**BRING
YOUR ID
AND
MEDICAL
CARD**

**DON'T MISS
ALL THE
GREAT INFO!**



www.sapoznik.com
877.948.8887



DATE:
Friday, October 11, 2019
LOCATION:
HR Conference Room
TIME:
11:30 AM - 12:30 PM

**Pink Photo Booth,
Breast Self-Exam Information,
Tree of Hope Note Card.**

sapoznik.
WHERE HEALTH BENEFITS

Sapoznik Insurance Corporate Wellness

BREAST CANCER AWARENESS



INFORMATION ON BREAST CANCER



**JOIN US!
WEAR PINK**

**Don't
miss all
the info!**



www.sapoznik.com
877.948.8887

LET'S BE AWARE
We can fight breast cancer together

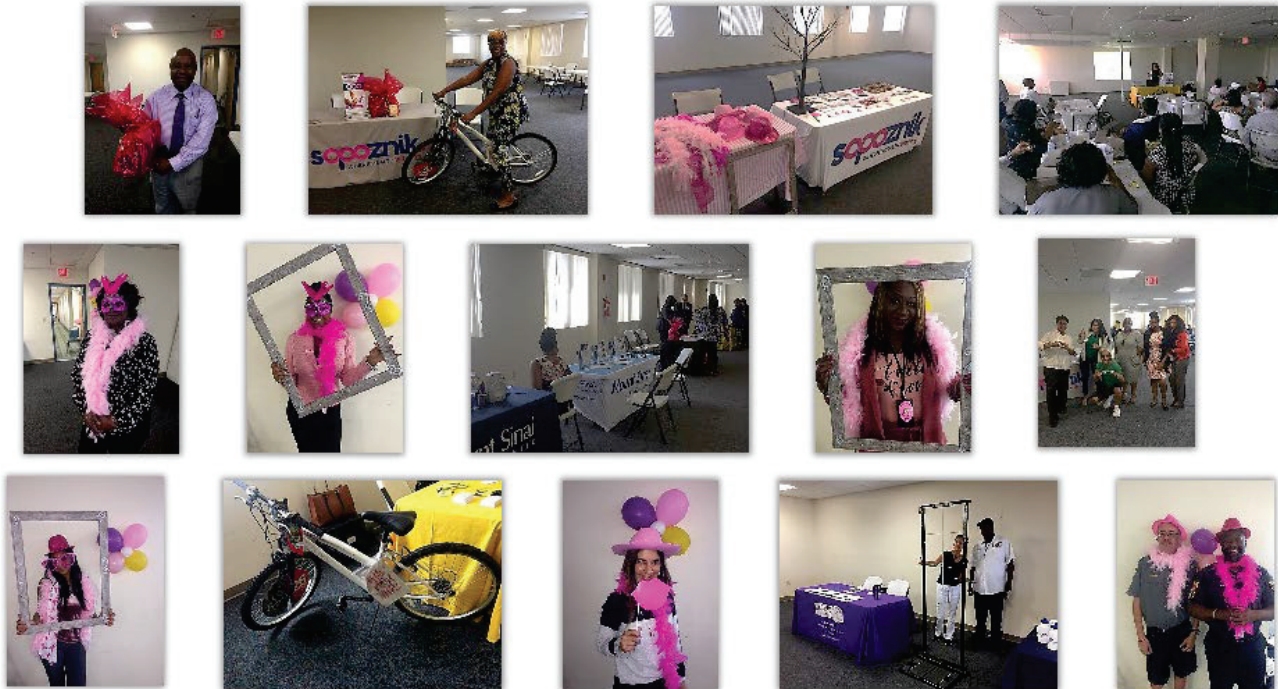
DATE:
Tuesday, October 30, 2018
LOCATION:
780 Fisherman Street
Suite 335
Opa-locka, Florida 33054
TIME:
12:00 PM - 1:00 PM

**ENJOY HEALTHY SNACKS,
Pink Photo Booth,
Breast Self-Exam Information,
Tree of Hope Note Card.**

sapoznik.
WHERE HEALTH BENEFITS

Sapoznik Insurance Corporate Wellness

City of Opa Locka Health & Wellness Fair Photos



Due to the **pandemic**, in 2020 we **pivoted our focus to virtual wellness** and providing Covid-19 resources through our website and webinars. Our virtual wellness strategy fosters total wellness - a holistic approach. We offer complimentary classes for all ages to address physical, mental, and financial health. Whether it is a yoga class with your pet, an art class for kids, or a managing your money class, we provide options any time on any day.

Register today at <http://www.sapoznik.com/register>

JUNE 2021

ALZHEIMER'S & BRAIN AWARENESS MONTH

GO PURPLE

SHARE YOUR STORY
#ENDALZ #ENDALZHEIMERS

REGISTER TODAY WWW.SAPOZNIK.COM

Virtual Wellness Calendar

JOIN US FOR COMPLIMENTARY CLASSES ON

» Nutrition » Financial Health

» Mental Health » Physical Well-being

sapoznik.
A WORLD COMPANY

Tag us

YEAR-ROUND SUPPORT

Sapoznik believes that there should be a **monthly priority** that pertains to employee benefits. For most brokers, there is always a presence during open enrollment, but for our company there is continued service in the 10 months outside of this period. Throughout the year, Sapoznik will schedule time to be onsite or available virtually. During that time, we are available for questions from your employees, conduct open enrollment for new hires, and make sure your plan for wellness and education is being reinforced.

- Monthly on-site or virtual new hire enrollment meetings – to educate all new hires on their benefits and facilitate their understanding and choice of benefits
- Monthly and quarterly review of claims reports – ensure we are on top of any trends that would increase costs, as well as analyze high claimants and potential solutions
- Quarterly wellness reviews – review metrics to quantify and qualify events/activities and design future events
- Mid-year review of program – review of entire program and any course corrections that need to be made
- Key compliance dates - ensure timely compliance of ACA and benefits related mandates

The calendar on the following page shows you our commitment to year-round support:

OUR COMMITMENT TO YEAR-ROUND SUPPORT

JANUARY	FEBRUARY	MARCH	APRIL
- New hire meetings all locations - Wellness newsletter	Claims Review - New hire meetings all locations - Wellness newsletter	- New hire meeting all locations - Promote Biometric screenings - Wellness newsletter	Health and Wellness Fair - Biometric Screenings - Body Mass Index - Ergonomic Screenings - Breast Cancer Awareness - Nutrition Counseling - Fitness stations - New hire meetings all locations - Wellness newsletter
MAY	JUNE	JULY	AUGUST
- New hire meetings all locations - Wellness newsletter	- Pre-renewal meeting—strategy discussion - Begin renewal - Preparations and census data collection - New hire meetings all locations - Wellness newsletter	Wellness Event—Lunch & Learn: Diabetes Awareness - Quote and customize plans with all carriers Claims review - Compliance check - New hire meetings all locations - Wellness newsletter	- Wellness program discussion - Finalize payroll deductions - Deliver employee benefit guides and kits - New hire meetings all locations - Wellness newsletter
SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
- Hold Annual Open Enrollment Meetings Across All Locations Announce Wellness Program for Following Year Renewal finalized - Wellness Newsletter	- Renewal Implemented with carriers and payroll company - ID cards mailed to employees Wellness event—Breast Cancer Awareness Month - Wellness newsletter	- New hire meetings all locations - Wellness kick off meeting - Wellness newsletter	Wellness Event - Lunch & Learn: Eating Healthy and Staying Active - New hire meetings all locations - Wellness newsletter

PHILANTHROPY

At Sapoznik, philanthropy and charitable outreach are part of who we are. From the president's office to the receptionist's desk to every team member who works closely with our clients, each employee embraces our core values that take charitable outreach well beyond sitting on a board or writing a check.

We get our hands dirty — literally. We've built gardens, participated in Teach-A-Thons, and served as role models for our public schools. We've fundraised, provided meals, and delivered materials for area teachers and backpacks brimming with school supplies for children.

We've donated bikes and helmets for children, volunteered at food banks, distributed turkeys for

Thanksgiving, collected clothes for the homeless at Miami's Camillus House, and spearheaded capital campaigns for foster and group homes. Being successful in business isn't just about the bottom line. It's about doing what's right. That is why we are consistently recognized as one of the leading philanthropic companies in South Florida.

2020 A YEAR OF CHANGE

We are in this pandemic together, and there are many among us who desperately need our help. For this reason, we started the #SapoznikCares initiative, to ensure that the most vulnerable members of our communities are not forgotten. It is imperative that we not only take care of ourselves, but that we also extend a helping hand to those who urgently need it.



VIRTUAL WELLNESS
360 CLASSES

CORPORATE GIVING
\$77,851
cash contributions

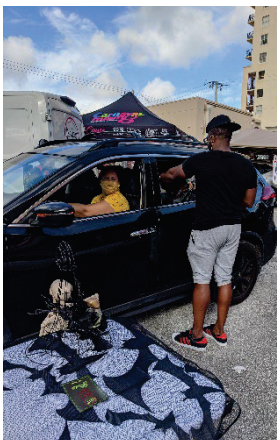
\$350,000
in supplies donated to non-profits
in partnership with The Education Fund

500 POUNDS OF FOOD DONATED



WE GOT YOU

33,500 LIVES IMPACTED



3.2.6 TAB 5: EXPERIENCE AND QUALIFICATIONS

DID YOU KNOW?

86% of employees say finances are a top source of stress for them now and in the future

Source: MetLife's 19th Annual U.S. Employee Benefit Trends Study 2021



3.2.6.1 Specify the number of years the Proposer has been in business.

Sapoznik Insurance has been in business for 34 years.

3.2.6.2 Identify the Proposer's qualifications to perform the services identified in this RFP as listed in section 2-2 of the Scope of Services. Include resumes, not exceeding one page each, of all key personnel who will be assigned to the City

Please see tab 8 for current Agent of Record services to governmental agencies as well as private entities.

Eugene Mintze III

VP, Benefits Consultant | 2-15 License | HIPAA Certified

Eugene joined Sapoznik Insurance in 2014. As a member of the Sapoznik team, Eugene's role is to retain current clients as well as identifying and building new client relationships. His goal is to make sure that once you are a client of Sapoznik Insurance, you are a client for life. During his time at Sapoznik Insurance, Eugene has worked with several non-profit organizations and municipalities. Specifically, he has seven years of experience in the public sector. Eugene grew up in Opa-locka and cares deeply about the community. He is a graduate of Youngstown State University where he played college football and ran track. He was recognized by *South Florida Business and Wealth* magazine's 40 under 40.



Robin Konikoff

Benefits Account Champion | 2-15 License | HIPAA Certified

Robin has over 20 years of experience in employee benefits and 25 years in human resources. She has worked with public sector clients for over seven years. Prior to joining the Sapoznik team, Robin's history included benefits administration with a background in human resources for a large automotive group and a medical management company. Robin was born in Georgia but was raised in South Florida, living here most of her life. She is the proud mom of two sons, one of which serves in the United States military.



Suany Roye

Claims Advocate | HIPAA Certified

As a 12-year Sapoznik team member, Suany manages claims policy issues. She advocates on behalf of our clients and has vast experience and knowledge in the claims processing arena. Prior to joining Sapoznik, she worked as a case worker for a national carrier for 10 years. She has a specific expertise in medical billing. Suany is the proud mom of two wonderful children.



Rachel Sapoznik, Founder and President | 2-15 License | HIPAA Certified

Rachel A. Sapoznik is the founder and President of Sapoznik Insurance, an industry leader in employee benefit and wellness solutions serving clients nationwide. She founded Sapoznik in 1987 from her home. Celebrating 34 years in business, Sapoznik Insurance, a World Company, is one of the Top 100 Insurance Brokers in the country, an Inc. 5000 Fastest Growing Private Company, a Best Place to Work and one of the largest independently owned agencies in the South Florida region. Rachel has 25+ years of experience working with public sector organizations, specifically municipalities.



Rachel is recognized as one of South Florida's leading healthcare experts being featured in several national mediums such as CNBC.com, Yahoo! Finance, MarketWatch, Reuters, Employee Benefit Advisor, and Automotive News. Locally, she has been featured in Invest Miami, The Miami Herald, The South Florida Business Journal, Crain's Miami, South Florida Business & Wealth Magazine, and Miami Today. She is a pioneer and thought leader in employee wellness initiatives. Rachel recognized early on the importance of education and wellness and building strong programs for her clients. She authored a book, A Passion for Wellness: Healthy Employees, Healthy Bottom Line, which was on Amazon's best seller list for new releases.

Aside from her numerous business accomplishments, Rachel has always made it a priority to help the communities she serves. As a leading philanthropist in South Florida, she is deeply involved in several charities, with a focus on those that are dedicated to improving the lives of children - JAFCO and The Education Fund.

Awards/recognitions she has received in the past five years:

- 2021 South Florida Business Journal Power Leader
- 2020 Honoree for the South Florida Business & Wealth Apogee Awards
- Philanthropy Miami 2020 Donor Next Door Award
- South Florida Business Journal's Top Insurance Agencies in South Florida, 2015 - 2019
- The Commonwealth Institute Top 50 Woman-Led Businesses in Florida, 2015-2019
- South Florida Business Journal's Top Women-Owned Businesses, 2015 - 2019
- South Florida Business Journal's Top Corporate Giving/Corporate Foundations, 2015, 2017, 2019
- Employee Benefit Adviser Top Women in Benefit Advising, 2018
- The Silver Stevie Award for Female Entrepreneur of the Year, Business Services 2017
- Enterprising Women of the Year Award Honoree, 2017
- South Florida Business Journal's 2016 South Florida Ultimate CEO

Akin Ayodele, Business Development Executive | 2-15 License | HIPAA Certified

Akin Ayodele is Head of Business Development for Sapoznik Insurance, A World Company. His focus is opening new channels to help drive business opportunities through relationships with community leaders and organizations.



An entrepreneur at heart, Akin was Managing Partner and Co-Founder of Eagle Rock Wealth Management before joining Sapoznik Insurance. He may be familiar to many people in Florida from his nine years as a starting linebacker in the NFL, including playing for the Miami Dolphins and the Jacksonville Jaguars, who drafted him in 2002. Known for his athleticism and work ethic, Akin also played for the Dallas Cowboys, and Buffalo Bills.

Akin received his Liberal Arts degree from Purdue University where he played football and studied Psychology & Law in Society, with a minor in Organizational Leadership. After retiring from the NFL he earned his Masters of Business Administration degree from The George Washington University.

Akin has a passion for giving back and is Co-Founder of The Dream Builders Foundation, a nonprofit organization that matches NFL players with local charities to benefit at-risk youth. He is also a motivational speaker, inspiring youth groups, educational organizations, and corporations with his belief in the power of perseverance, positivity, and hard work.

In his personal life Akin is an avid traveler and has been to five continents. He still works out five days a week and loves to take on new challenges, like jumping out of planes, scuba diving or working on his golf game. Akin is recently married and is a new father to a baby girl.

Other significant achievements:

- 2003 & 2004 Candidate for NFL Man of the Year Award (Jacksonville Jaguars)
- 2005 Jacksonville Chapter, The Force Behind The Change Award
- 2009 Candidate for NFL Man of the Year Award (Miami Dolphins)
- 2006 Attended Harvard Business School's Entrepreneurial Business Program, receiving credit and certification for completion of the course.
- 2009 Drew Brees Mental Toughness Award
- 2013 United Nations Friends of Good and Health Awards

3.2.7 TAB 6: SCHEDULE

TOP FIVE TRENDS IMPACTING THE WORKPLACE

#3 Flexibility is here to stay, but it will require creative solutions to foster collaboration and manage workloads.

Source: MetLife's 19th Annual U.S. Employee Benefit Trends Study 2021



3.2.7.1 Include a timetable that identifies the amount of time required to complete each component of the program.

DATE	SERVICE STANDARDS	DELIVERABLE	SAPOZNIK
	Client designates the benefits administrator to provide guidance throughout the process	Discuss and determine the City's goals, and set expectations to ensure all stakeholders agree with the plan and next steps	Upon the City confirming their decision to contract Sapoznik Insurance the account team will begin their process
June 2021	Pre-renewal meeting – strategy discussion Begin renewal preparations and census data collection Ongoing meetings With client designated benefits administrator	Census collection including employee information such as: • Name • Dob • Gender • Benefits participation/ • Carrier • Eligibility status (part-time, full-time, seasonal, etc.) • Eligibility guidelines plan documents of benefits being offered • Employer/employee contributions by product line by carrier • Summary of benefits • Billing set up guidelines • IRS schedule 5500 • Claims reports • Cobra	Benefits consultant Client managers

July 2021	Ongoing through the open enrollment period and as necessary Wellness event	Quote and customize all plans with carriers Meet to set the service expectations and timelines Set up implementation calls with the carriers and monitor deliverable timelines Determine OE specifics Notify additional enrollment partners of the process, expectations, and timelines Wellness Lunch & Learn	Benefits consultant Dedicated client manager Carrier representatives Employee communications
August 2021	Ongoing through the open enrollment period and as necessary	Finalize payroll deductions Deliver employee benefit guides and kits	Benefits consultant Carrier representatives Prior carrier
September 2021	Open enrollment	Hold annual open enrollment meetings Announce wellness program for the following year	Benefits consultant Carrier representatives Client managers
October 2021	Renewal implementation with carriers and payroll Mail ID cards	Review accumulators reports to ensure the deductible and maximum out of pocket amounts are properly credited (<i>whenever applicable</i>) Breast Cancer Awareness Event	Benefits consultant Carrier representatives Prior carrier
December 2021	Wellness event	Wellness Lunch & Learn	Wellness team and approved vendors
April 2022	Wellness event	Wellness Day	Wellness team and approved vendors

Quarterly, semi-annually and at renewal	On agreed set schedule	Review eligibility and claims reports	Benefits consultant Designated client manager Carriers
Weekly, monthly, or as needed.	Ongoing throughout the year	Weekly and/or monthly meetings as needed to assist new hires with questions regarding their benefits Ordering of marketing materials for meetings	Designated client manager Champion/enroller Carrier representatives Ongoing employee service meetings
Monthly	On-going throughout the year	To assist and educate employees in the enrollment process	Designated client manager Carrier service representative Initial weekly meetings with employees; after the first quarter on a bi-monthly basis until group is completely implemented Maintenance educational meetings held with the employees until all enrollment materials have been collected Follow up with benefits administrator to verify all employees are in receipt of their id cards, and the first month billing is audited

3.2.7.2 Indicate the earliest available start date for your project team.

Given an October 1st effective date, the pre-renewal meetings start in June.

3.2.7.3 Indicate the project completion date based on the date provided in 3.2.7.1.

The open enrollment is finalized and completed by September 31st. However, our work continues throughout the year to help educate city employees, conduct wellness programs, ensure compliance, and provide customer service and claims advocacy support.

3.2.8 TAB 7: PRICING OF SERVICES

TOP FIVE TRENDS IMPACTING THE WORKPLACE

#4 Employers are evolving their benefits approach to meet the changing needs of employees, build employee resilience, and support worker well-being.

Source: MetLife's 19th Annual U.S. Employee Benefit Trends Study 2021



3.2.8.1 Fee basis should be an all-inclusive, base fee.

All commissions outlined below cover the costs associated with the services we render on your behalf including those listed below.

- Employee Navigator (on-line enrollment tool)
- Wrap documents for Welfare Benefit Plan 5500's
- Development and printing of the benefits guides
- Wellness program and fairs
- ThinkHR (training, compliance information, educational platform, and more)
- Completion of 1095's
- Cobra administration (available)

Medical	4%
Dental	5%
Vision	5%
Short & long-term disability	10%
Supplemental	10%

This is what we've done for the City of Opa-locka to **contain costs and save money**:

- Through our negotiations with the carriers, we've **saved** the **City** over **\$605,000** in the past four years
- We've **absorbed** all **costs** relating to **compliance**, **technology**, and **wellness** programs
- Provided **educational programs** to help employees understand their benefits and where to go for care, which in turn reduces claims costs
- **Provided claims advocates** to ensure that your workforce is more productive – we manage the process
- Supported and participated in the City's annual October **breast cancer awareness** campaign to ensure breast cancer prevention

3.2.9 TAB 8: REFERENCES

TOP FIVE TRENDS IMPACTING THE WORKPLACE

**#5 As they confront
social justice concerns,
employees need their
employer's support.**

Source: MetLife's 19th Annual U.S. Employee Benefit
Trends Study 2021



3.2.9.1 List a minimum of three (3) references in Florida for which the proposer has provided Agent of Record services. Include the name of the organization, brief description of the project, name of contact person telephone number and email address.

Miami Shores Village

Employee benefits program that includes medical, dental, vision, Life & AD&D, long-term care, long-term disability, whole life, critical illness, medical bridge, cancer policy, and accident insurance

Sarah Simpson, Controller

305.762.4856

SimpsonS@msvfl.gov



Town of Lauderdale-by-the-Sea

Employee benefits program that includes medical, dental, vision, life & AD&D, long-term disability, Gap plan, and short-term disability

Lisa Slagle, Senior Office Specialist

954.640.4203

lisas@lauderdalebythesea-fl.gov



Family Resource Center of South Florida

Employee benefits program that includes medical, dental, vision, short-term disability, long-term disability, Gap plan, accident insurance, critical illness coverage, cancer policy, whole life, life and accidental death & dismemberment

Oren Wunderman, CEO

305.374.6006

owunderman@frcflorida.org



Florida Memorial University

Employee benefits program that includes medical, dental, vision, life & AD&D; Long term disability, short term disability, GAP plan, voluntary life and AD&D, supplemental insurance – accident, cancer, critical illness, disability, and term life

Youseline Poteau, Director of Human Resources

305.626.3622

Youseline.poteau@fmuniv.edu



Town of Cutler Bay

Employee benefits program that includes medical, dental, vision, life & accidental death and dismemberment, short term disability, long term disability, voluntary life, and supplemental policies for accident, cancer, critical illness, life, and medical bridge

Jazmin Gonzalez, Administrative Services Director

305.234.4262

JGonzalez@cutlerbay-fl.gov



3.2.10 TAB 9: ADDITIONAL FORMS

DID YOU KNOW?

**42% of all
employees say
social justice issues
are a source of
stress and anxiety**

Source: MetLife's 19th Annual U.S. Employee Benefit
Trends Study 2021



Proposers must compete and submit as part of its Proposal all of the following forms and/or documents

- Proposer Qualifications
- Certification regarding debarment and suspension
- Drug Free workplace certification



RFP NO. 21-0629100

AGENT OF RECORD FOR EMPLOYEE BENEFIT PROGRAMS

PROPOSER QUALIFICATIONS

The Proposer, as a result of this proposal, MUST hold a County and/or Municipal Contractor's Occupational License in the area of their fixed business location. The following information MUST be completed and submitted with the proposal to be considered:

1. Legal Name and Address:

Name: Sapoznik Insurance and Associates, LLC

Address: 1100 NE 163rd Street 2 FL

City, State, Zip: North Miami Beach, FL 33162 Phone/Fax: 305.948.8887

2. Check One: Corporation ☒ Partnership ☐ Individual ☐

3. If Corporation, state: 1987 FL
Date of Incorporation: _____ State in which Incorporated: _____

4. If an out-of-state Corporation, currently authorized to do business in Florida, give date of such authorization: _____

- 5. Name and Title of Principal Officers** **Date Elected:**

Rachel Sapoznik, President	1987
----------------------------	------

6. The length of time in business: 34 years

7. The length of time (continuous) in business as a service organization in Florida:
34 years

8. Provide a list of at least three commercial or government references that the bidder has supplied service/commodities meeting the requirements of the City of Opa-locka specification, during the last twenty-four months. Please refer to

9. A copy of County and/or Municipal Occupational License(s)

Note: Information requested herein and submitted by the proposers will be analyzed by the City of Opa-locka and will be a factor considered in awarding any resulting contract. The purpose is to insure that the Contractors, in the sole opinion of the City of Opa-locka, can sufficiently and efficiently perform all the required services in a timely and satisfactory manner as will be required by the subject contract. If there are any terms and/or conditions that are in conflict, the most stringent requirement shall apply.

City of North Miami Beach
Community Development Division
Business Tax Receipt
17050 NE 19 Avenue
North Miami Beach, FL 33162

Thank you for choosing the City of
North Miami Beach!

You can now visit us on-line at www.citynmb.com
or you can e-mail us at NMBBTR@citynmb.com

MAIL TO:
SAPOZNIK INSURANCE AND
1100 NE 163 STREET 2FL
NORTH MIAMI BEACH, FL 33162-4515



THIS IS YOUR 2020-2021 BUSINESS TAX RECEIPT.

Important Reminders:

Business Tax Receipts expire **September 30th** of each year. You must submit all fees and documents (if applicable) prior to that date or you may be subject to **delinquency fees, an additional Cost Collection Fee of \$250.00, placement of a lien on the property, and/or involuntary shutdown of this business by the Police Department.**

You are required to notify the City, in writing, if there have been any changes in ownership, location, nature of business, any contact information, and/or when this business ceases operations. **This is in order to ensure that you are not billed in error.** Failure to notify this office of such changes may result in the assessment of penalty fees and collection activities.

Have any more questions?

Our friendly staff is here to assist you by phone, (305) 948-2917, Monday-Friday from 8:30 a.m.- 5:00 p.m., or at our office Monday-Friday from 9:00 a.m.- 4:00 p.m. We would love to hear from you!

***** THIS IS NOT A BILL – DO NOT PAY *****

Please detach the below receipt and display in a conspicuous place.

2020-2021 No.: 189399 - RENEWAL Acct No: 603317 DBA: SAPOZNIK INSURANCE AND Location: 1100 NE 163 STREET 2FL NORTH MIAMI BEACH, FLORIDA Activity: INSURANCE AGENCY Remarks:	City Of North Miami Beach BUSINESS TAX RECEIPT	Valid 10/01/2020 - 09/30/2021 <table style="width: 100%;"> <tr> <td>Taxes:</td> <td style="text-align: right;">177.05</td> </tr> <tr> <td>Penalty Fee:</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Credit:</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>TOTAL PAID: \$</td> <td style="text-align: right;">177.05</td> </tr> </table> This receipt is non-transferable without City approval and is only valid at the location(s) listed herein	Taxes:	177.05	Penalty Fee:	0.00	Credit:	0.00	TOTAL PAID: \$	177.05
Taxes:	177.05									
Penalty Fee:	0.00									
Credit:	0.00									
TOTAL PAID: \$	177.05									



**RFP NO: 21-0629100
PRICE PROPOSAL FORM**

AGENT OF RECORD FOR EMPLOYEE BENEFIT PROGRAMS

PROPONENT understands and agrees that the Contract Price is the lump sum to furnish and install all of the Work complete in place. Vendor's price will not be adjusted unless the CITY changes the scope of the Project after the Contract Date.

As such, the Vendor shall furnish all labor, materials, equipment, tools, superintendence and services necessary to provide a complete, in place Project for the Proposed Price of:

LUMP SUM PRICE: Please refer to Tab 7 for complete pricing of our services and refer to RFP addendum no. 2 page 3 question #20.

SUBMITTED
THIS 28 DAY OF June 2021.

BID SUBMITTED BY:

Sapoznik Insurance, A World Company

305-948-8887

Company

Telephone Number

Rachel Sapoznik

n/a

Name of Person Authorized to Submit
Bid

Fax Number

rachels@sapoznik.com

Signature

Email Address

President

Title



CITY OF OPA-LOCKA

**CERTIFICATION REGARDING DEBARMENT, SUSPENSION
PROPOSED DEBARMENT AND OTHER MATTERS OF
RESPONSIBILITY**

1. The Proposer certifies, to the best of its knowledge and belief, that the Proposer and/or any of its Principals:

A. Are not presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency.

B. Have not, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property; and

C. Are not presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph 1-B of this provision.

2. The Proposer has not, within a three-year period preceding this offer, had one or more contracts terminated for default by any City, State or Federal agency.

A. "Principals," for the purposes of this certification, means officers; directors; owners; partners; and, persons having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions). This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution Under Section 1001, Title 18, United States Code.

B. The Proposer shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Proposer learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

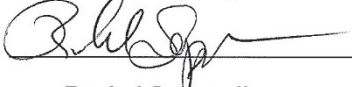
C. A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the Proposer's responsibility. Failure of the Proposer to furnish a certification or provide such additional information as requested by the Contracting Officer may render the Proposer non-responsive.

D. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of a Proposer is not required to exceed

that which is normally possessed by a prudent person in the ordinary course of business dealings.

E. The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Proposer knowingly rendered an erroneous certification, in addition to other remedies available to the Government, the Contracting Officer may terminate the contract resulting from this solicitation for default.

AS THE PERSON AUTHORIZED TO SIGN THE STATEMENT, I CERTIFY THAT THIS FIRM COMPLIES FULLY WITH THE ABOVE REQUIREMENTS.

Signature 

Printed Name Rachel Sapoznik



**CITY OF OPA-LOCKA
RFP NO. 21-0629100**

DRUG-FREE WORKPLACE CERTIFICATION FORM

Whenever two (2) or more bids/proposals, which are equal with respect to price, quality, and service, are received by the CITY OF OPA-LOCKA for the procurement of commodities or contractual services, a bid/proposal received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of controlled substances is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in number (1).
4. In the statement specified in number (1), notify the employees that as a condition for working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction on or plea of guilty or no contest to any violation of Chapter 893, Florida Statutes or of any controlled substance law of the United States or any singular state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of Section 287.087, Florida Statutes.

This Certification is submitted by Rachel Sapoznik the
(Name)
President of Sapoznik Insurance, A World Company
(Title/Position) (Company)

who does hereby certify that said Company has implemented a drug-free workplace program, which meets the requirements of Section 287.087, Florida Statutes, which are identified in numbers (1) through (6) above.

06/28/21
Date

[Signature]
Signature



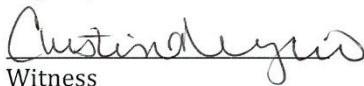
**CITY OF OPA-LOCKA
NON-COLLUSION AFFIDAVIT**

STATE OF FLORIDA - COUNTY OF MIAMI DADE

Rachel Sapoznik being first duly sworn, deposes and says that:

- (1) He/She/They is/are the **President**
(Owner, Partner, Officer, Representative or Agent) of
Sapoznik Insurance, A World Company the PROPONENT that has submitted the attached proposal;
- (2) He/She/They is/are fully informed respecting the preparation and contents of the attached Proposal and of all pertinent circumstances respecting such Proposal;
- (3) Such Proposal is genuine and is not a collusive or sham Proposal;
- (4) Neither the said PROPONENT nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, have in any way colluded, conspired, connived or agreed, directly or indirectly, with any other PROPONENT, firm, or person to submit a collusive or sham Proposal in connection with the Work for which the attached Proposal has been submitted; or to refrain from Proposing in connection with such Work; or have in any manner, directly or indirectly, sought by agreement or collusion, or communication, or conference with any PROPONENT, firm, or person to fix any overhead, profit, or cost elements of the Proposal or of any other PROPONENT, or to fix any overhead, profit, or cost elements of the Proposed Price or the Proposed Price of any other PROPONENT, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the proposed Work;
- (5) The price or prices quoted in the attached Proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the PROPONENT or any other of its agents, representatives, owners, employees or parties of interest, including this affiant.

Signed, sealed and delivered in the presence of:


Witness


Witness

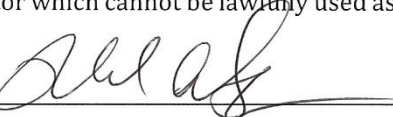
By: 
Signature

Rachel Sapoznik, President
Print Name and Title



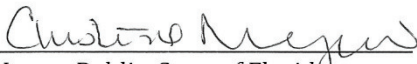
NON-DISCRIMINATION AFFIDAVIT

I, the undersigned, hereby duly sworn, depose and say that the organization, business or entity represented herein shall not discriminate against any person in its operations, activities or delivery of services under any agreement it enters into with the City of Opa-locka. The same shall affirmatively comply with all applicable provisions of federal, state and local equal employment laws and shall not engage in or commit any discriminatory practice against any person based on race, age, religion, color, gender, sexual orientation, national origin, marital status, physical or mental disability, political affiliation or any other factor which cannot be lawfully used as a basis for service delivery.

By: 
Title: President

Sworn and subscribed before this

28 day of June, 2021


Notary Public, State of Florida

Christine Nunzio
(Printed Name)



My commission expires: 6/19/24



E-VERIFY

Effective January 1, 2021, public and private employers, contractors and subcontractors will be required to register with, and use of the E-verify system in order to verify the work authorization status of all newly hired employees. Vendor/Consultant/Contractor acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of:

- a) All persons employed by Vendor/Consultant/Contractor to perform employment duties within Florida during the term of the contract; and
- b) All persons (including sub-vendors/sub-consultants/sub-contractors) assigned by Vendor /Consultant/ Contractor to perform work pursuant to the contract with the Department. The Vendor /Consultant/ Contractor acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the contract is a condition of the contract with the City; and

By entering into a Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes but is not limited to utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The contractor shall maintain a copy of such affidavit for the duration of the contract. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. If t contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination. The Contractor acknowledges it is liable to the City for any additional costs as a result of termination of the contract due to Contractor's failure to comply with the provisions herein.



E-VERIFY FORM

Definitions:

"Contractor" means a person or entity that has entered or is attempting to enter into a contract with a public employer to provide labor, supplies, or services to such employer in exchange for salary, wages, or other remuneration.

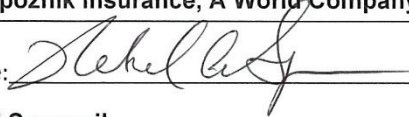
"Subcontractor" means a person or entity that provides labor, supplies, or services to or for a contractor or another subcontractor in exchange for salary, wages, or other remuneration.

Effective January 1, 2021, public and private employers, contractors and subcontractors will begin required registration with, and use of the E-verify system in order to verify the work authorization status of all newly hired employees. Vendor/Consultant/Contractor acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of:

- a) All persons employed by Vendor/Consultant/Contractor to perform employment duties within Florida during the term of the contract; and
- b) All persons (including sub-vendors/subconsultants/subcontractors) assigned by Vendor/Consultant/Contractor to perform work pursuant to the contract with the Department. The Vendor/Consultant/Contractor acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the contract is a condition of the contract with the City of Opa-locka; and

Should vendor become successful Contractor awarded for the above-named project, by entering into this Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes but is not limited to utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The contractor shall maintain a copy of such affidavit for the duration of the contract. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. If this contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination.

Company Name: Sapoznik Insurance, A World Company

Authorized Signature: 

Print Name: Rachel Sapoznik

Title: President

Date: 6/28/21

Response to Request for Proposal

June 29, 2021



Copy



Prepared by:

Peter Troup

Vice President, Corporate Benefits

3300 PGA Blvd Suite 530
Palm Beach Gardens, FL 33410
T: 561-350-1329
Peter.Troup@nfp.com



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3.2.3 TAB 2 – LETTER OF TRANSMITTAL

We appreciate this opportunity to propose how NFP can partner with the City of Opa-locka to provide employee benefits broker services. We believe there is an exceptionally strong match between the needs identified by the City and our strengths and experience in the public sector. We are confident that our team's energy, expertise, and oversight will bring a fresh approach for strategy and provide an enhanced level of service and capacity for your human resources department. Throughout our response, you will see how our organization was strategically designed to provide the very services you are and should be requesting. Simply put, we are built to effectively serve public entity clients and to provide a comprehensive level of customer service.

Our public entity team's sole focus is the delivery of effective customer service for our public sector clients. We currently serve over 200 public entities across the Southeast and have a proven track record of successful results, client satisfaction and client retention. We build meaningful long-term relationships as we pride ourselves on quality and consistency.

We have a commitment to excellence in service. It is reflected in every aspect of what we do, from our dedicated client service teams to our comprehensive service model, to technology and benefits administration, to our extensive client resources and industry expertise. We successfully couple our national presence with local resources to provide the high touch level of personalized service required to be an effective partner with public entity clients across the Southeast.

We believe a client's needs and desires are the most important factors in the insurance process. We take an extraordinary amount of time and care to ensure our clients receive the services and products they deserve. Client satisfaction is our number one priority.

We strive to exceed our clients' expectations with the following approach:

- **Contact** – We consult with clients regularly to ensure all aspects of their benefits programs are meeting expectations.
- **Education** – We conduct employee meetings and provide custom communication materials for all employees.
- **Advocacy** – We work on behalf of our clients to bring an unbiased perspective to all situations, with no allegiance to any specific carrier or vendor.
- **Personnel** – We hire, train and retain a professional, experienced staff and that are dedicated to the clients they serve. We have the capacity to support growth with a consistent level of service.
- **Information** – We possess the information and expertise to negotiate comprehensive, competitive benefits programs. We know where to find the answers to any of your insurance, employee benefits and human resources questions.

Thank you for your consideration of our response. Any questions can be directed to the individuals listed below:

Peter Troup (Authorized Representative)
Vice President, Corporate Benefits
3300 PGA Blvd, Suite 530
Palm Beach Gardens, FL 33410
561-350-1329
Peter.Troup@nfp.com

Johnathan Shaw (Authorized Representative)
AVP, Public Sector Practice Leader
13 North Main St, Suite 201
Statesboro, GA 30458
770-713-8375
Johnathan.Shaw@nfp.com

RFP NO: 21-0629100
Agent of Record for Employee Benefit Programs
City of Opa-locka

TO: The City of Opa-locka

All:

I hereby certify the contents of the attached proposal to be accurate and deliverable.

Respectfully submitted,

Tammi Starkey

Title

Signature: _____

Date: _____

3.2.4 TAB 3 – GENERAL INFORMATION

3.2.4.1 Name of Business.

NFP Corporate Services (SE) Inc.

3.2.4.2 Mailing Address and Phone Number.

3300 PGA Blvd, Suite 530
Palm Beach Gardens, FL 33410
800-994-7429

3.2.4.3 Names and contact information of persons to be contacted for information or services if different from name of person in charge.

Primary Contact:

Peter Troup – peter.troup@nfp.com
561-350-1329

Secondary Contact:

Johnathan Shaw – Johnathan.shaw@nfp.com
770-713-8375

3.2.4.4 Normal business hours.

Monday – Friday
8:00am – 5:00pm

3.2.4.5 State if business is local, national, or international and indicate the business legal status (corporation, partnership, etc.).

International
Incorporated

3.2.4.6 Give the date business was organized and/or incorporated, and where.

NFP was established in 1999 as National Financial Partners in New York.

3.2.4.7 Give the location of the office from which the work is to be done and the number of professional staff employees at that office.

Account Management – 6 Senior Level Employees

3300 Palm Beach Gardens Blvd | Suite 530

Palm Beach Gardens, FL 33410

Service Center and Technology – 35 Customer Service Representatives

351 Washington Ave | Suite 120

Marietta, GA 30060

3.2.4.8 Indicate whether the business is a parent or subsidiary in a group of firms/agencies. If it is, please state the name of the parent company.

Your proposed team is a part of the NFP Public Sector Solutions specialty practice that works exclusively with public entity clients in Georgia, Florida and South Carolina. This vertical is strategically designed to offer a comprehensive suite of customer services for public entity clients.

3.2.4.9 State if the business is licensed, permitted and/or certified to do business in the State of Florida and attach copies of all such licenses issued to the business entity.

NFP is licensed to do Business in the State of Florida. A copy of that license is in section 3.2.10 required forms.

3.2.5 TAB 4 – PROJECT APPROACH

Describe in detail your proposal to fulfill the requirements of the scope of services listed in section 2.2 of this RFP.

Scope of Service Requirements	NFP Standard Operating Procedure
Broker Health, Dental, Life, Short-term disability, Long-term disability, Vision and Voluntary benefits	NFP will actively broker all employee benefits on the City's behalf on an annual basis.
Serve as the City's Consultant and provide such brokerage services to the employer to ensure comprehensive and cost-effective benefits are included in the City's benefits plan selection by the City's eligible employees and retirees	NFP will actively broker all employee benefits on the City's behalf on an annual basis. Step 4 details the comprehensive nature of our process once the strategy is identified to ensure comprehensive and cost-effective benefits are being offered to your employees. See step 4 (product and service selection)
Present plan design recommendations that support the City's benefit strategies and position the employer to comply with Federal, State, and other regulatory requirements each year	Your dedicated team will present plan design recommendations upon the conclusion of a comprehensive market review. All plans are reviewed to ensure they are in compliance with all applicable laws. See step 4 (product and service selection)
Administer the City's health and welfare plans, including setting reserves, reporting experience and projecting funding levels when applicable	Steps 5-7 address our comprehensive suite of customer service offerings to include actuarial review and claims reporting. Claims reports will be provided to the City on a monthly basis. See step 5 (implementation), step 6 (service model) and step 7 (ongoing service and performance monitoring)
Provide ongoing advice on ERISA, COBRA, FMLA and HIPAA reporting obligations, and other laws and regulations affecting the City's benefit plans as it relates to the insurance products within this RFP.	The NFP Compliance team, which includes industry attorneys, provide ongoing communication as it pertains to legislative updates and support for benefits and employer issues to include but not limited to: ERISA/COBRA/FMLA/HIPAA/ARPA/FFCRA See page 16 (Suzanne Spradley)
Provide comprehensive services (traditional and web-based) necessary to enroll current plan designs, plan modifications and consumer education	Steps 5-7 address our comprehensive process and suite of customer service offerings to include our benefits administration system, bswift, that is available for year-round enrollment and support. The 5 core components of bswift are enrollment, electronic data interfacing, employee communication, administration, and reporting.
Provide comprehensive services necessary to serve as the Voluntary benefits, including enrollment support and election reconciliation	Steps 5-7 address our comprehensive suite of customer service offerings to include open enrollment education and support for <u>all</u> benefits to include voluntary offerings. Step 5 details our implementation strategy as it pertains to enrollment support. Your dedicated service team is responsible for all post enrollment activities to include audits and billing reconciliation.
Provide a call center with representatives to respond to City employees and retirees	Our service center works <u>exclusively</u> with public sector clients and is designed to assist your employees and retirees with general benefits questions, enrollment assistance, claims assistance and to provide other benefits related support.
Shall agree that all data exchanged between the selected Proposer and the Employer or prospective customers belongs to the employer and shall be accessible at any time during the life of the contraction for no additional fee	Agreed. Our model is fully <u>transparent</u> .
The Proposer must provide a benefits administration technology platform to be accessible year-round for new hire enrollment and change in status elections of benefits	Bswift is to be provided at no cost. NFP is responsible for the development and build of your site and is available to your employees on a year-round basis.
Provide technical assistance to reduce the overall cost of providing these benefits through a variety of means including developing effective negotiation strategies to expeditiously reduce the absolute cost of health insurance benefits	We believe and aggressive marketing, prescription drug analysis, comprehensive wellness programs and potential clinic solutions to reduce and stabilize the direct cost of your health insurance. Our comprehensive approach looks at both the direct and indirect cost of offering and administering your health insurance and benefits cost to save our clients as much as possible without sacrificing <u>quality</u> . Aside from the cost we can save on the benefits themselves; we have found that the time we are able to save your benefits team and employees has proven to be invaluable.

Solicit and negotiate annual renewal of existing coverage including soliciting multiple alternative proposal coverage.	We conduct comprehensive plan marketing on an annual basis in accordance with the client's annual timeline. See step 4 (product and service selection)
A comprehensive summary of responsive quotes from insurance carriers will be presented to the City Manager	NFP solicits proposals from all A rated insurance carriers and will provide recommendations and executive summary to the City Manager on an annual basis. See step 4 (product and service selection)
Respond to all employee issues and questions in a timely manner regarding their benefits	Our strategic design allows us to deliver real time service and support for our clients. Email communication turnaround requirement is <24 hrs. Our service center is available M-F 8:30-5:00 with an average wait time of less than 1 minute. Cell phone information provided to benefits team for emergency situations and after hours assistance.
Provide City with dedicated agents for any assistance needed	The proposed NFP service team will provide a comprehensive suite of service and assistance to the benefits team and your employees. See proposed service team.
Provide the City with support for the wellness program	Our director of wellness program strategies, Ebony Marbury, will oversee the wellness program development. Her role is to provide a comprehensive level of support to the wellness program and assist with coordination of various wellness related activities.
Support the City in organizing and coordinating two (2) employee wellness fairs annually	Our director of wellness program strategies, Ebony Marbury, will oversee the wellness program development. Her role is to provide a comprehensive level of support to the wellness program and assist with coordination of various wellness related activities.
Assist the City in the evaluation and implementation of a wellness and disease management program and measure effectiveness of the program.	We currently oversee more than 150 comprehensive wellness programs and have a proven track record of delivering positive results. Please refer to the City of Albany case study for an illustration on how we track and measure the effectiveness of our programs. See Tab 10 (Exhibits)
Provide a program for ACA tracking and 1095 reporting, which includes mailing out forms.	Through bswift, we provide assistance as it pertains to ACA tracking and reporting as needed. We provide services for the development, delivery, and submittal of your annual 1095 reporting requirements.
Identify claims trends and anomalies in a timely manner and prepare recommendations to the City on actions to be taken, if any.	We provide monthly claims reporting services to track and identify any claims trends both positive or negative in a timely manner. We have provided a sample monthly claims review for your consideration.
Review, process and administer all employee claim issues	Agreed. Our structure is designed to funnel all employee issues through our service team. We ask that your team direct individuals to us for assistance on any and all benefits related issues, questions or concerns.
Review historical claims experience, demographic data trends and plan performance from a financial perspective	Agreed.
Coordinate and participate in the implementation and enrollment process and employee meetings	Our philosophy is to provide as many resources as possible to empower your employees to make educated decision regarding benefits elections. Education will be the first major component of our implementation process and is detailed in Step 5 of our process. In addition to educational meetings, we also provide both on-site and telephonic enrollment support. See step 5 (implementation)
Assist in the review and/or creation of enrollment materials to enhance the overall perceived value of the benefits and compensation	Agreed. NFP will develop enrollment materials, benefits confirmation statements and total compensation statements to help employees better understand the value of the benefits you provide. See tab 10 (Exhibits)
Coordination of annual benefits fair at no cost to the City	Agreed. See step 5 (implementation)
Preparation of insurance applications, compile and format support information needed and requested by insurance company underwriters	Agreed. See step 4 (product and service selection)
Compile and maintain historical underwriting information. Provide copies of this information to the City	Agreed. Our model is fully transparent. We compile and maintain detailed claims and benchmarking data on your behalf and is made available for you at any time. Claims reports are provided monthly and are reviewed no less than quarterly with your team.
Development of annual employee benefits statements	Agreed. See attached benefits confirmation statement and total compensation statement. See Tab 10 (exhibits)

Our public entity team's sole focus is the delivery of effective customer service for our public sector clients. We build meaningful long-term relationships as we pride ourselves on quality and consistency. Our organization is strategically designed to provide a comprehensive and specialized level of support. Each of these dedicated team members play a specific role and is vital in delivering quality service pertaining to the administration, education, development, service and support of your employee benefits package.

Consultants – NFP Broker Consultants are the point-of-contact for product and plan solutions. Consulting brokers interact with client specific account managers regularly to ensure cohesive management of their NFP clients. The consulting broker's responsibility is to analyze, evaluate and work with each client to ensure measurable solutions are implemented to reduce and stabilize cost while ensuring that a quality benefit plan structure is in place.

Placement – NFP placement department provides analytical support to our Broker Consultants. This team specializes in developing RFP's, marketing products and analyzing results for clients on an annual basis.

Account Management – Your dedicated account manager serves as the primary day-to-day contact for the clients' administrative staff. Each Account Manager has assigned client support staff members who assist them with in-office administrative support. Your account manager is responsible for administrative support for your benefits team/HR for billing, audits, eligibility, open enrollment and claims assistance.

Client Support – NFP account managers are supported by client support specialist. The client support specialist's primary function is administrative in nature. They update insurance carrier systems for specified changes, collect and process qualifying event documentation, process new hires and termination data to payroll and carrier systems, process open enrollment documentation, assist in the resolution of claims and provide general support to your service team.

Compliance and Regulatory Support - Our dedicated team of in-house compliance professionals aggregate, interpret, disseminate, and provide specific action steps for each piece of legislation. Our compliance team, which works closely with our consulting team, is well versed in a variety of benefits compliance topics, including ACA, HIPAA, COBRA, etc. Our team is entirely focused on keeping up to speed with the rapidly changing environment and ensuring content is provided to our consultants in a timely manner.

Technology - NFP has centralized (in house) technology staff that focus solely on our clients' on-line enrollment and data collection systems. These individuals are responsible for building and customizing employee sites, managing electronic data feeds (EDI) with insurance carriers, developing enrollment portals and managing the employee benefit communication center for clients.

By having an in-house technology team, we have the ability to customize your online education and enrollment system and have more efficient response time to the changes that may be require.

Employee Service Center – Our service center will serve as the primary point of contact for the majority of your employees and is operated in our corporate office in Marietta, Georgia. These dedicated specialists act as an advocate for your employees and assist in the understanding of benefits, resolution of claims, appeals assistance, locating in-network providers, ordering new ID cards, on-line enrollment support, confirmation statements and other general benefit assistance.

The call center operates a VOIP telephone system that allows for all calls to be recorded and documented in our internal database.

Enrollment Support - NFP benefit counselors provide enrollment support in conjunction with brokers and account managers. Our enrollment counselors are salary based, which enables them to offer sound advice and assistance to your employees. This advice and assistance is designed to

educate your employees and answer specific questions to ensure they fully understand their options. This ensures your employees are provided with enough information to make the best decision for their specific situation. Removing the “pressure sell” environment is an extremely valuable and important aspect of our model that has been very well received by our clients.

Wellness Services - NFP employs a full-time Director of Comprehensive Health Strategies. Her role is to design and implement worksite wellness programs that are cost effective and provide optimum results. She guides our clients through all aspects of program design, marketing and implementation.

As we review the scope of services listed in this RFP, it is important to understand that our model provides all of these services as a part of our standard operating procedure. We strategically built our team to provide an all-inclusive level of service to our public entity clients. We understand the challenges you face as you try to control cost, improve employee communication and education, provide ongoing assistance while juggling everything else you have on your plate; we are here to help. Essentially, our team is designed to become a direct extension of your human resources to serve as the City’s benefits department.

Below, we outline our approach for this project and highlight where the scope of services listed in this RFP are provided as a part of our methodology and approach. The scope of services review at the beginning of this section clearly illustrates are all inclusive service model we provide and the comprehensive approach we utilize to serve our clients.

Our goal is to be your **partner for long-term, strategic success**. To that end, it is imperative that we understand the features of your current and previously offered benefits, the goals of your organization, your employees’ needs and expectations, your budgetary constraints, your employee recruitment and engagement challenges and plans, your communications capabilities and preferences, and other aspects of your business and employee group. To gain that understanding, we ask questions of various stakeholder groups, we listen, and we work with you to develop a benefits structure and implementation plan that will positively impact your organization. Above all, we **listen**, and we act according to your goals and needs.

We have simplified the explanation of our process of providing consulting and brokerage services as our *Methodology and Approach*; the seven steps shown here graphically and then discussed in detail in the following pages.



1. **Discovery** – Collecting vital information about your company, current benefit plans, and employees
2. **Gap Analysis** – Identifying missing plan elements and ways to improve performance
3. **New Strategy** – Providing recommendations to optimize the plan
4. **Product and Service Selection** – Reviewing and selecting the best product and service mix for you
5. **Implementation** – Managing, administering, and communicating changes to your benefits plans
6. **Service Model** – Acting as an extension of your HR/Finance team for you and your employees
7. **Ongoing Service and Performance Monitoring** – Creating opportunities for feedback to ensure optimum impact on the organization, plus regulatory training and compliance



STEP 1 – NFP will work with you to understand your organization’s philosophy about employee benefits, your current benefits, and the goals you have for your benefits plan and for your organization. We want to understand your employee population - not just their claims history, but also their needs and expectations from a benefits program and other factors such as their tolerance for change.

Understanding your benefits philosophy

Different employers offer benefits for different reasons. While some offer benefits due to industry standards that necessitate them for recruitment and engagement purposes, others take a very active approach in designing a benefits plan that enhances the organization’s culture. To some, benefits are an expense to be mitigated, while to others, benefits are an investment in their employee population and a key element for attracting new employees. Gaining an understanding of your competitive position and your benefits philosophy creates the basis for building a strategic direction for the future.

Assessing your current benefits position

We will review your benefit offerings, plan design, current carriers and service providers, administration, and funding. We will also do a financial assessment of your benefits budget, plan costs (historical and forecasted future costs), review the main cost drivers, determine opportunities for savings, and develop options for employer and employee contribution strategies. In addition, we will review your communications strategy and look for opportunities to ensure your employees understand the breadth of benefits and services that are available to them, as well as the value of the “hidden paycheck” they receive through your contributions to their benefits. We can include competitive survey data, involve your benefits committee, and take other actions necessary to ensure that we both agree on “the big picture.”

Surveying your employees and your competition

At your discretion, we can also conduct a survey of your employees, in total or by focus groups. The survey allows us to measure employees’ attitudes, perceptions, and understanding of their benefits package. If you’re uncertain of the specific benefits offered by your employment competition, we can also survey them, or access survey information available in the industry. The results of our surveys are formulated in full color charts and tables with quantitative data that provides us with an even greater understanding of your employee population or competitors.



STEP 2 – After reviewing the necessary information in the Discovery phase, we will conduct an in-depth analysis of your overall benefits package and make recommendations based on our findings. As part of this process, we provide detailed and thorough analysis in specific areas, including in-depth claims analysis and predictive modeling, network analysis and benchmarking reports.

We utilize two cutting edge analytical tools to provide these actuarial services for our large self-funded clients.

NFP uses data analytic tool that allows us to drill down by **disease state**, **member type** and more to strategically **target engagement levels** and **project future cost drivers** within your benefits program. We also provide **benchmarking analysis** and plan **modeling capabilities** to provide all information necessary to make informed, data driven decisions.

By using the most current data to target these cost drivers and forecast what you will spend in the future, you will:

- Get ahead of the spending curve by seeing a 360-degree view of your entire population
- Identify prevention treatment compliance and gaps in care, and apply a risk stratification to your population, identifying those at high risk.
- Have an important resource tool for designing an effective wellness program and/or coordinating with your well-being vendor to support other employer initiatives to actively engage the right members at the right time.
- Make an accurate assessment of your claims in comparison to other large employers
- Understand the potential impact of plan changes to employee cost share and City budget

Network Analysis

Health care quality transparency continues to emerge as an important element in strategically managing health care cost increases. Using DMW and other tools provided by NFP, we are able to meet the changing demands of the health care selection and plan design process by providing a comprehensive software solution that allows us to analyze carrier networks using both access and quality information, allowing us to help you:

- Make informed decisions about provider cost, quality and access;
- Compare networks on an apples-to-apples basis;
- Request the right information from health plans;
- Identify gaps in your network; and
- Identify the network(s) that offer the best discount for services in your area.

Ultimately, we will help you determine what is important to the success of your plan, assist you in setting appropriate goals, and then help you achieve those goals.



STEP 3 – Once we have completed the Gap Analysis, we will provide you with formal recommendations to set the new strategy for your organization's benefits with a 5-year strategic master plan. This master plan will consider both your financial and cultural objectives, the needs of your employees, your competitive position, and your strategic plans. We will prepare recommendations to manage the long-term cost of your benefit package, while maintain the value. Your NFP team will partner with you to evaluate plan designs in the context of emerging industry trends and changing regulations, in addition to the other factors already noted.

The focus areas will vary depending on our analysis and the feedback received during the Discovery and Gap Analysis steps but may include the following items.

- | | |
|---|---|
| – Employee cost sharing | – Case management/coordination and utilization review |
| – Contribution structure | – Voluntary benefits |
| – Funding alternatives | – Employee education and communications |
| – Wellness, disease management programs and/or onsite clinic models | – Dependent eligibility audit |
| – Prescription drug management | |



STEP 4 – Based on the new strategy, your NFP team will work with various insurance carriers, TPAs, pharmacy benefit managers and other vendors to create the ***optimum plan design*** for the products to be offered to your employees.

There are many viable, A-rated carriers and vendors available in the benefits market. Due to our overall block of business and experience in the insurance marketplace, NFP has developed “preferred broker relationships” with multiple carriers that have proven themselves to be service-oriented, creative, flexible and consistent. We are able to leverage these

relationships to create a competitive situation that ultimately results in **improved pricing, higher guaranteed-issue amounts, and lower participation requirements**.

NFP doesn’t consider any firm to be an exclusive carrier or vendor because we will not limit our flexibility in providing you the best, unbiased, options for your benefits. Our responsibility is to leverage our relationships on your behalf to secure the products and solutions that provide the most value for you and best meet your needs.

NFP has preferred broker relationships with the following vendors.

Medical Carriers – Aetna, Alliant, Anthem (Blue Cross and Blue Shield), Cigna, Humana, Kaiser, United Healthcare

Pharmacy Benefit Managers (PBMs) – Benecard, Data Rx, Express Scripts, Optum, PharmAvail, ProCare Rx, ScripWorld, True Rx, as well as NFP Rx Solutions

Stop Loss Carriers and Third-Party Administrators (TPAs) – Aetna, Allied Benefits, AmWINS, Anthem, Beacon Risk, Berkley, Capital Administrators, Cigna, Excess Re, HCC Tokio Marine, HealthSmart, HM Insurance Group, International Risk, Key Benefit Administrators, Meritain Health, National General, Nippon Life, Optum Health, Paragon, Stealth Partner Group, Sun Life, Symetra, Voya, Zurich, as well as the NFP Stop Loss Center of Excellence

Dental and Vision Carriers – Ameritas, Anthem, Avesis, CEC Vision, Cigna, Delta Dental, EyeMed, Guardian, Lincoln, MetLife, National Vision Administrators, Principal, Standard, Sun Life, Superior Vision, United Concordia, United Healthcare, Unum, VSP

Life and Disability Carriers – Anthem, Cigna, Dearborn National, Guardian, Hartford, Lincoln, MetLife, Mutual of Omaha, Nippon Life, OneAmerica (AUL), Principal, Prudential, Reliance Standard, The Standard, Sun Life, Unum, Voya

Worksite Carriers and EAP Vendors – Aflac, Allstate, Ceridian, Chubb, Colonial, ComPsych, Concern: EAP, Corp Care, EAP Consultants, Guardian, LifeWorks, MetLife, Optum, Texas Life, TransAmerica, Trustmark, Unum

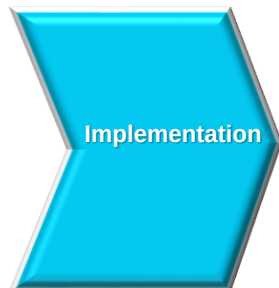
FSA/HSA/HRA Administrators – Admin America, Ameriflex, Continuum, FlexCorp, Flores & Associates, Medcom, Navia, Optum, TASC, WageWorks

Other Vendors/Administrators – Aetna Global, ARAG, Care Here, Corporate Health Partners, FlexCare, GeoBlue, GoPivot, HPOne, ID Experts, IMG Global, MetLaw, MyIdealDoctor, Nationwide, Starmark, Teledoc, UHC Global, Wrangle 5500

Once we have established the type of plans, products, and services to be included in your benefits package, we begin the process of soliciting bids from the appropriate carriers and service vendors. We prepare and submit Requests for Proposals and analyze the responses to those RFPs. Throughout this process, we also negotiate with carriers and vendors to obtain the most competitive price and performance guarantees available. We gather all the carrier and vendor proposals, then we present their proposals in a format that allows you to easily compare the details of each.

Based on your preferences, past experience and our industry insight, we will select the appropriate products and services and negotiate contracts to meet the needs of the organization and your employees. We will work with each selected carrier to develop an implementation timeline. And to make certain that you continue to have the optimum plan, your NFP team performs marketing efforts and analysis on an annual basis.

It is not our intention to frequently change the carriers or TPAs utilized by your organization. Our preference is to use competitive data from the marketplace to leverage your renewal with the incumbent carriers unless there is an issue with the service provided.



STEP 5 – At NFP, we understand that our clients are searching for more efficient methods to manage, administer and deliver employee benefits to their employees. They are not only looking for cost-effective solutions, but also user-friendly tools and resources that heighten the employee experience. Our philosophy is to arm your benefits team with as many resources and your employees with as much information as possible to allow each person to make an educated decision regarding the optimum benefit plan election for their family situation. We think employee education is extremely important in today's market and, because of this, education will be the first major component of our implementation process.

Comprehensive Benefits Education and Communication

Employee benefits are more complex than ever, and the impact of making a poor choice can be devastating to an individual employee. Making benefits decisions from a wide array of increasingly complicated and costly health care plans and voluntary benefits can be overwhelming. Different employees have different coverage needs. So, they need information, and they sometimes need help in making decisions. To ensure your employees fully understand their options, we will meet with various groups to explain each line of coverage in detail. We prefer to conduct these educational meetings on-site as they are designed to provide access to the information for all employees.

The service team assigned to your organization is available to answer your employees' questions, and our Service Center is available for those who cannot attend educational meetings. We also provide benefits enrollment guides, voice-over PowerPoint presentations, and educational videos through an online **Benefits Resource Center** to provide better access to employees in remote or multiple locations.

Enrollment Assistance

Once these educational meetings have been completed, our team of salaried enrollment counselors are available for one-on-one enrollments. For those who wish to enroll themselves, our on-line enrollment technology is provided to streamline and simplify the process. And for those who still have questions or who are not "tech savvy", our Service Center staff will complete the enrollment process with them by phone. We do not outsource any of these activities and we absorb **all costs** associated with these value-added services.

Technology Tools

We will develop and maintain a customized **Benefit Resource Center** designed to be an extension of your own human resources and benefits website. As mentioned above, this resource will be your employees' access point for the decision-support and ongoing education capabilities. It will house all the enrollment guides, explanatory videos, plan documents, forms, FAQs, and other information we will provide to help your employees understand the benefit options available to them. Many of our clients elect to utilize this as an onboarding hub and house required new hire forms on this site

as well. Our goal is to have this resource be the “go to” website for your employees 24 hours a day during open enrollment and throughout the year.

bswift is the benefit management system brought to you by NFP. It is consistently ranked as the #1 benefit information system by *Business Insurance* magazine. We currently have 70 clients utilizing our bswift platform representing over 40,000 employees plus their dependents and beneficiaries. Additionally, we are a channel partner with bswift, meaning that we are one of the few firms selected by bswift to have access to develop and customize the system for our clients. This also means that we have our own well-trained staff to design the system with **complete control** of the process and quality of delivery to our clients.

The major components of the bswift benefits management system can be described in the following sections.

Enrollment

bswift’s award-winning enrollment system offers a wide range of options that can be tailored to fit all of your needs for open, new hire, life event and special (individual) enrollments. The system enforces all applicable rules so that administrators and employees cannot make mistakes, and so that eligibility effective dates and premium bills are accurate. Enrollment options include:

- Administrator-only or employee self-service enrollments;
- Passive, semi-passive and active enrollments;
- Enrollment for only one benefit plan or for each benefit plan offered to an employee;
- Side-by-side plan comparisons that include “drill down” information;
- Overage dependent notifications, status change alerts, emails to employees who have not completed enrollment; and
- Web links, FAQ’s, documents, glossary, online question submissions and more.

EDI

An electronic data interface (EDI) is an automated process of transmitting information directly to insurance carriers, other vendors and even back to your own HR/Payroll system. bswift’s ability to generate these files create major time-saving opportunities for your staff.

- NFP develops, tests and maintains all of your EDI feeds
- Expert development of HIPAA 834 feeds, Web services and Single Sign-On (SSO) connections
- Over 3,700 existing EDI feeds with carriers, TPAs and payroll/HRIS systems
- Proprietary EDI Feed Builder™ tool saves our clients time and money
- Ability to import data in any format

Employee Communication

We can also utilize bswift to communicate directly with your employees. Through bswift, your employees have access to:

- | | |
|--------------------------------|---------------------------------|
| – Employee benefits portal | – Decision making tools |
| – Educational videos | – Total compensation statements |
| – Customized enrollment guides | – Benefit Plan Comparisons |

Benefits Administration

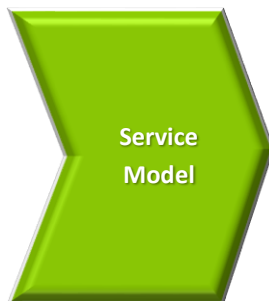
By offering the following services, bswift allows us to take some workload from your HR/Benefits/Payroll team, freeing them to do the more important work they should be doing.

- COBRA administration
- Billing reconciliation
- Premium reconciliation
- Payroll processing
- Data transmission
- Beneficiary designation
- Data analytics

Reporting

Our system offers over 300 standard reports including census reports, billing reports, pending enrollments, overage dependents, and many more. Reports can be downloaded into Excel or .csv format for further manipulation if desired. In addition, bswift's reporting tool allows your dedicated service team to design custom reports that can be scheduled to run automatically at predetermined intervals. These reports can be run for specific time periods and limited to specific benefit types, departments, locations, divisions and/or benefit classes.

bswift will help you reduce costly errors, eliminate paperwork and other manual processes, allow your administrative staff to be more effective, and give your employees the right tools at the right time to enroll in their benefits in a safe and secure manner. bswift provides you with the tools you need for a smooth implementation and ongoing administrative support.



STEP 6 – The NFP service model is focused on providing a level of service that you will consider exceptional. That service starts during the implementation phase, but once enrollment has concluded, we handle claims issues, benefit questions, and all other forms of customer service for the employees of our clients. We seek to provide you with unparalleled service by acting as an **extension of your human resources or payroll staff**, giving you the ongoing support capabilities needed to administer your benefits efficiently and effectively. We will serve as a liaison between you and the various insurance carriers and service vendors, offering assistance as needed with any claims, billing, or general service issues.

Our model provides service from a team where each consultant works with several account managers for different clients, and the same is true for client support specialists. This flexible “matrix” structure allows us to create the most effective team for your needs.

Your service team is led by an account manager. These are employees that have risen in our organization based on their communication skills, service skills, and attention to detail. Account managers have responsibility for the overall satisfaction and retention of our clients.

Each service team includes a dedicated client support specialist. The CSS is responsible for processing applications and confirming eligibility for employees of their assigned clients, for billing reconciliation and data transmission to carriers, as well as for answering employees' claims questions and resolving other escalated service issues.

As part of our service model, NFP's Georgia offices have a fully staffed Service Center that is operated in our Marietta location. The service center is open 8:30 am to 5:00 pm (Eastern), Monday through Friday except for holidays. We use the term “service center” with purpose. We are not just answering a call. We operate as a full-service team because these client support specialists act as

advocates for your employees and assist in the understanding of benefits, resolution of claims, appeals assistance, locating in-network providers, ordering new ID cards, on-line enrollment support, confirmation statements and general benefits assistance. The Service Center team is accessible by phone, fax and email.

Through our Service Center, we track and monitor all of a clients' incoming calls. We realize our Service Center is the primary point of contact for the majority of our clients, handling over 50,000 calls annually. Our client service metrics are monitored on a daily basis and are documented in our customized client database. Each client support specialist utilizes this database of information to resolve claims issues and answer benefit questions. All calls are logged into the database and reviewed by the account manager.

We can help you establish and work with employee wellness and benefits committees as well as ad hoc focus groups if needed. We are a huge proponent of client and employee feedback and can design and implement employee surveys on behalf of our clients that provide valuable insight on the overall perception of your benefits package. This helps identify pain points that may be present and allows us to take a proactive approach to provide solutions. Typically, this is conducted in the discovery phase of implementation to assist in our gap analysis and formulating an effective benefits strategy.

On a regularly scheduled basis, we are available to conduct enrollment meetings for new employees. These employees receive the same comprehensive and educational meetings that existing employees receive during Open Enrollment.

These service teams, coupled with our Service Center, are integral parts of our service model and represent another defining difference between NFP and other brokers in the employee benefits field.

This is service that you can depend on. And it is the level of service offered by NFP.



STEP 7 – At NFP, we know that our job does not end after your annual Open Enrollment period. To be your **partner for long-term strategic success**, we must have transparent, ongoing communication with your HR/Finance team. We will meet with them throughout the year to evaluate the success of the benefit plan strategies we have put in place and to address any needed change. We are here for you at any time to assist you and your employees in any way we can.

The feedback loop works as we **question** various stakeholder groups – including the carriers and other vendors, **listen**, and come to **understand** the issues that arise, administrative challenges, changes in strategy or organizational dynamics, or other impactful circumstances related to your organization and benefits. And then we **discuss** the impact and any necessary changes for our team, communication with your employees, or plan of service by the carriers and vendors.

These meetings are strategically conducted throughout the year utilizing data derived from claim analytic tools.

Carrier/Vendor Review

We will have regular meetings (quarterly, annually and as needed) to discuss claims experience, exposure changes, and general administrative matters that affect overall plan performance. We will also provide reports on a monthly, quarterly and annual basis. These reports will assist us in monitoring the plan's performance and highlighting any areas that need to be reviewed in future meetings as well as ideas for future plan design changes, wellness program design and/or the utilization of an on-site clinic model.

The level of detail included in each of these meetings varies depending on the amount of claims experience (or other measures) that is available, but may include the following:

Monthly Reports

- Claims Analysis
- Budget Performance
- Vendor feedback

Midterm Reports

- Budget projections
- Reserve adjustment analysis
- Actuarial opinions

Quarterly Reports

- Financial overview
- Claim utilization
- Claim trends
- Reserve analysis
- Stop-loss deductible and attachment point tracking

Year-End Reports

- Full financial overview
- Reserve calculation and actuarial opinion provided
- Cost comparisons
- Budget and rate update and review
- Deficit/surplus analysis

We will also discuss operational matters such as EDI file feeds, Service Center call volume, and any other matters of importance.

Additionally, there is ongoing training and compliance communication including the following options.

Compliance and Regulatory Support

Compliance in the insurance, human resource and financial arenas is challenging because the regulatory requirements are complex and ever-changing. We have a dedicated compliance team including industry attorneys that we can call on to help with any complex compliance or regulatory questions. Their expertise includes a wide variety of benefits compliance topics, including PPACA, COBRA, HIPAA, ERISA, FMLA, USERRA, ADA and Section 125 administration.

Compliance is difficult and complex. NFP does not simply rely on clients to read email blasts to gain understanding of new legislation and regulations. Our clients have full access, for no additional cost, to a fully staffed team of benefits compliance attorneys highly proficient in ACA, HIPAA, ERISA, etc.

Our dedicated, in-house compliance team monitors regulatory and legislative developments at both the state and federal level. NFP will provide your organization with a compliance process that includes the following:

Compliance Team	In-house attorneys who are well-versed in ACA, COBRA, FMLA, etc. They report on current trends and provide timely legislative updates
Newsletters	Keep abreast of new legislation and learn about new trends in HR
Compliance Portal	Comprehensive tool that assists with compliance efforts with federal requirements such as the ACA, ERISA, COBRA, HIPAA, FMLA, Non-discrimination, and Section 125
Seminars and Webinars	Education and clarification regarding complex compliance topics

Compliance Team

Our dedicated team of in-house compliance professionals aggregate, interpret, disseminate, and provide specific action steps for each piece of legislation. Our compliance team, which works closely with our consulting team, is well versed in a variety of benefits compliance topics, including ACA, HIPAA, COBRA, etc. Our team is entirely focused on keeping up to speed with the rapidly changing environment and ensuring content is provided to our consultants in a timely manner. NFP provides clients with ad-hoc industry update notices when significant events take place.

Newsletters

Our regular compliance newsletter, *Compliance Corner*, is distributed on a regular basis updating clients on changes in the legislative and regulatory environment. While this is not meant to be the sole source of compliance communication to our clients, the email's format was created based on feedback from our clients to ensure we are giving you quick updates of the most noteworthy and timely items. We also provide *Industry Insights*, a monthly newsletter that keeps HR managers on top of the latest industry trends. Topics include corporate benefits, retirement, health and well-being, and training. In addition, *Washington Update*, is an ad hoc white paper that is issued after major developments surrounding the ACA or any other legislative changes that may impact the employee benefits and/or Human Resources world.

Compliance Portal

NFP's Benefits Compliance Portal is a comprehensive tool to assist employer plan sponsors with their compliance efforts with federal requirements such as the ACA, ERISA, COBRA, HIPAA, FMLA, Nondiscrimination, and Section 125. Each requirement is identified on a checklist containing model notices, an employer's obligation, and a timeline for compliance and penalties for non-compliance. Our web-based compliance portal helps you adhere to numerous federal health and welfare plan rules and provides model notices that employers are required to provide.

Seminars & Webinars

Regular seminars and webinars on complex compliance topics help you gain a thorough understanding of legislation. We also provide you with one-on-one compliance training.

Additionally, we can provide ACA compliance assistance with 1094 and 1095 production. We offer COBRA compliance outsourcing at no additional cost to you. And we can provide legal review of plan documentation as needed to ensure compliance.

COBRA and HIPAA Administration

Our service package includes the full management of activities required by the Consolidated Omnibus Reconciliation Act of 1986 (COBRA) and related amendments and legislation, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA). Taking this huge administrative burden "off your plate" should give your team many more hours to be productive at the work they should be focusing on.

Section 125 Administration

Our service package also includes full management of activities required to establish a Section 125 Cafeteria Plan and Flexible Spending Account. Claims administration varies by vendor and will be discussed as part of our analysis prior to making a vendor selection. There are no separate fees associated with this administration. Each plan year we provide our clients with the plan documents, Summary Plan Descriptions (SPDs) and Adoption Agreements required under Part 1 of Title 1 of the Employee Retirement Income Security Act (ERISA).

3.2.6 TAB 5 – EXPERIENCE AND QUALIFICATIONS

3.2.6.1 Specify the number of years the Proposer has been in business.

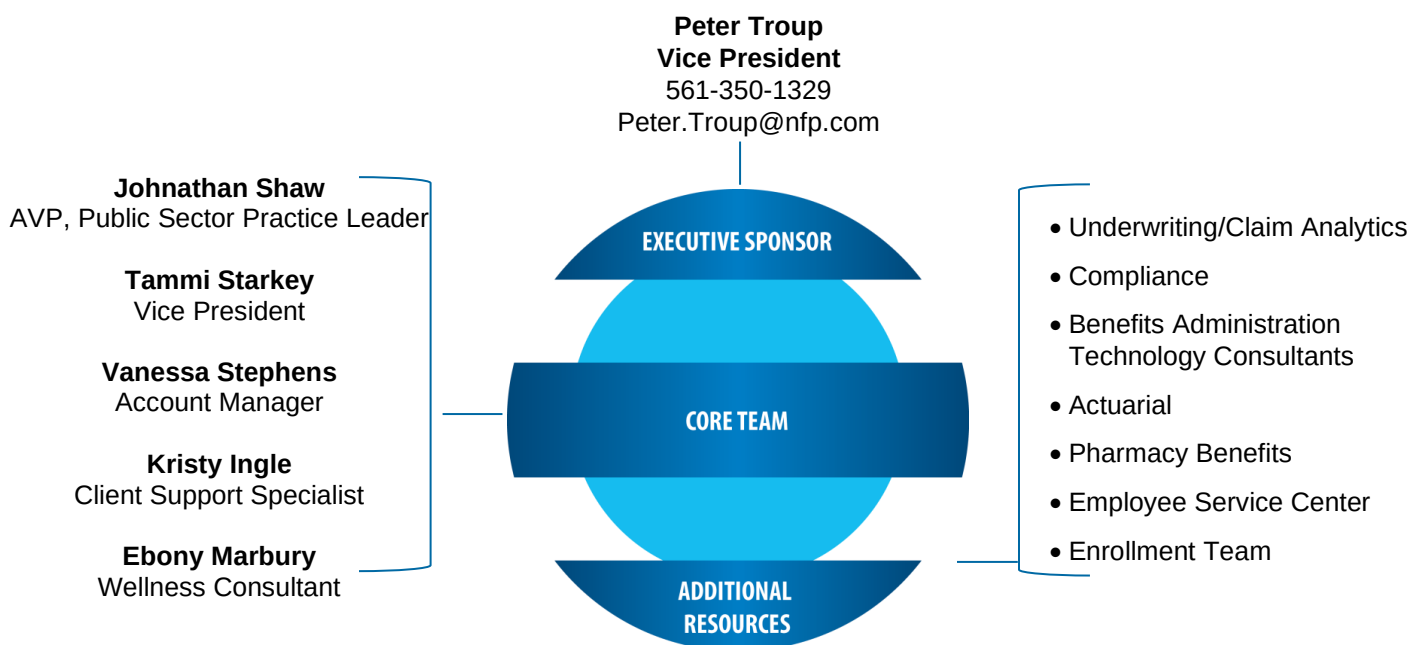
Our Public Sector Solutions team previously operated as **ShawHankins, Inc** and **The Bailey Group** as market leaders in public sector employee benefits consulting and brokerage. While these firms operated for almost 60 years as successful independent organizations, both companies elected to join NFP to develop a specialized team dedicated solely to public entity clients.

NFP was established in 1999 as National Financial Partners. We are currently majority owned by Madison Dearborn Partners, LLC and HPS Investment Partners, LLC. With this financial backing, NFP has grown to become a leading insurance broker and consultant that provides corporate benefits, property & casualty and individual solutions through our licensed subsidiaries and affiliates.

3.2.6.2 Identify the Proposer's qualifications to perform the services identified in this RFP as listed in section 2-2 of the Scope of Services.

NFP's proposed service provision would be an individual broker supported by your dedicated service team.

The proposed NFP team has over 80 years of combined experience that will manage and perform the elements of the engagement. This ensures continuity of care from one renewal to the next. While we have listed employees below, if upon meeting you, we learn that other team members might better meet your needs, we will discuss with you and make the best decision to ensure the best path forward for mutual success.



Peter Troup – Vice President, Corporate Benefits



As Vice President, Corporate Benefits, Peter works with current and potential clients to help solve the organizational challenges that keep them from achieving their goals.

Peter is part of NFP's Public Sector Solutions team and is actively involved in several local and national public entity groups (i.e. FERMA, FPHRA, RIMS, FGOA, PRIMA, etc.). He is also active with SHRM and locally with PBSHRM and provides detailed knowledge to his client about the ever-changing Public Sector landscape in the State of Florida.

Peter also sits on the Advisory Board for Feeding Palm Beach County (Part of Feeding South Florida) where he is helping bring awareness and is directly involved to help end food insecurity throughout South Florida. He is also a graduate of Leadership Palm Beach County's Focus Class of 2019 and continues to be involved and is currently planning the "next" Focus 2022. He is a Flagler College Alumni and is proud to call Florida his home!

Johnathan Shaw, GBDS – AVP, Public Sector Practice Leader



Johnathan earned a degree in Marketing with an emphasis in sales and sales management from Georgia Southern University in 2007. As team captain of the men's golf team, he earned Academic All-American status in 2006 while graduating Magna Cum Laude. Johnathan joined our organization in 2007 and completed the Broker Training program in 2008. His ability to clearly communicate the details of our offerings has been very well received by his clients and their employees. Johnathan works exclusively with public-sector employers and prides himself in being extremely detail oriented.

We encourage you to review Johnathan's LinkedIn profile for more information as well as recommendations provided by some his clients. Please go to

www.linkedin.com/in/johnathan-shaw-gbds-30402812b

Johnathan works closely with your dedicated service team to ensure all administrative needs are met. Johnathan will attend all management and employee meetings as required to support the selection process, final decisions, and communication strategy.

Tammi Starkey – Vice President, Consulting Services



As Vice President, Consulting Services, Tammi works with current and potential customers to evaluate their needs and provide the best solutions for their employee benefit programs. She works with our clients to monitor the performance of their plans, develop recommendations to control costs, and approach the benefit offering with a strategic view. This includes consulting on budgeting, funding options, pharmacy drug program solutions, comprehensive wellness programs and compliance. With a vast product knowledge and strong relationship with local and national carriers, Tammi provides our clients with a competitive edge and creative solutions.

Vanessa Stephens – Account Executive



Vanessa joined us in 2015 having already gained experience in account management and other service roles with Peachtree Benefit Group and Willis. Now serving as an account executive, Vanessa works with larger and more complex clients. She is responsible for developing benefit strategies with the client, delivering marketing results, reviewing and analyzing claim and other data, and leading account management and service for her accounts. She is significantly involved in all aspects of communication with groups as well as individual employees.

Kristy Ingle – Team Lead, Client Support Specialist



As client support specialist (CSS), Kristy is responsible for all aspects of member enrollment, termination, and eligibility. For her assigned clients, Kristy assists in ensuring data integrity between the client, bswift, and carrier systems so that bill reconciliation and reporting are always accurate. As the team lead for our CSS group, Kristy helps ensure that each client's data and processes are handled consistently across our service spectrum.

Ebony Marbury – Wellness Consultant



Ebony joined our company in 2019 and is a vital component in the development, implementation and analysis for all wellness plans and on-site clinics. Having been a wellness coordinator for almost 10 years, Ebony has seen firsthand the benefits of employee wellness programs. Ebony previously lead wellness efforts for Presbyterian Homes of Georgia, the Midtown Family Wellness Center, the Weston Group and Aegis Therapies.

As our wellness consultant, Ebony works as a client resource to design and implement worksite wellness programs and onsite health clinics which are cost effective and provide optimal results. She guides the client through all aspects of program design by assisting with vendor selection, providing on-going support and communication, and evaluating outcomes to provide a complete wellness package.

Roger Bartlett – Senior Office Manager, Marietta Service Center



Roger joined us in 2017 after a long career in human resources, with significant experience in employee benefits, compensation, employee relations, and HR systems. His career included thirteen years as benefits manager with Georgia school districts in Savannah-Chatham County and Cobb County, as well as various roles with employers in the medical, insurance, legal and retail fields. Roger is available to deliver our “Benefits 101” training on benefits basics to your staff and to help your management team with other human resources issues.

Starting in 2019, Roger manages our Service Center. He and the service team assist your employees with enrollment, getting ID cards, understanding Explanation of Benefits forms, collecting documentation of Qualifying Events, completing claim forms, and other forms of service they need.

In addition to the core team, we can assign additional resources from the NFP Austin resource center. These resources include:

- **Larry Doze, SVP, Actuarial Services and Financial Analysis** – leads the Actuarial Services Team, which provides actuarial services and support, including consultations, analyses, and valuations related to all employee benefits programs and plans.
- **Suzanne Spradley, SVP, Associate General Counsel and Chief Compliance Officer Legal & Compliance** – oversees the Benefits Compliance Department, which provides consulting services on all aspects of employee benefits compliance.
- **Mark J. Rieder, Head of Innovation & SVP, HR Technology and Benefits Administration** – champions, develops, and institutionalizes the innovation process for NFP. Mark serves as a leader in developing ideas for new technologies, products, services, and practices, and works to drive adoption and manage high-quality execution across organizational lines. Mark also leads our HR technology consulting practice. With extensive backgrounds in human resources and HR/benefits technology, Mark and his team will work with clients to review existing systems, along with the current process/workflow, in order to identify potential areas of inefficiency and redundancy. Fueled with this information, they assist in identifying technology solutions that streamline the entire employee lifecycle.

3.2.7 TAB 6 – SCHEDULE

3.2.7.1 Include a timetable that identifies the amount of time required to complete each component of the Program.

Target Date	Action Element	Responsible Party
Onboarding and Renewal		
08/01/21	Approval of NFP as Broker of Record	COL
08/03/21	Initial onboarding and strategy meeting	NFP/COL
08/03/21	Coverage data requested from carriers	NFP
08/06/21	Benefits census and elections provided to NFP	COC
08/13/21	RFP out to market	NFP
09/05/21	NFP to present results of marketing	NFP
09/12/21	Plan decisions made by the City of Opa-locka	COL
09/15 – 10/01	Development of communication pieces, carrier documentation	NFP
09/15 -10/01	Bswift updated for open enrollment testing	NFP
10/01/21	Enrollment guide completed	NFP
10/04 – 10/08	Open enrollment –educational meetings	NFP
10/11 – 10/15	Open Enrollment – Salaried benefits counselors on-site	NFP
10/18 -10/22	Eligibility data audited and submitted to carriers	NFP
11/01/21	Payroll file upload to the City of Opa-locka	NFP
12/01/21	ID cards mailed to members	Carriers/NFP
01/01/21	Effective date of new plan year	Carriers

3.2.7.2 Indicate the earliest available start date for your project team.

Your NFP team is ready to start immediately upon award.

3.2.7.3 Indicate the project completion date based on the date provided in 3.2.7.1.

The dates provided in 3.2.7.1 is an example of a standard timeline we would utilize for a client with a January 1 renewal date. This timeline is flexible and customizable based on your specific needs.

3.2.8 TAB 7 – PRICING OF SERVICES

3.2.8.1 Fee basis should be an all-inclusive, base fee.

Product	
Health Insurance	5%
Dental	10%
Vision	10%
Employer Paid Basic Life and AD&D	10%
Employee Paid Voluntary Benefit Elections	Standard
ACA Management (\$7.50 Per EE) – NFP will absorb Cost	Cost Included
Technology – Bswift	Cost Included

Employee paid voluntary products are defined as any insurance product, selected by employee, retiree or dependent, which are 100% paid by the previous mentioned, at no expense to the City of Opa-locka. All percentages will be disclosed in writing to the City of Opa-locka at time of carrier recommendation and selection. Standard industry commissions are fully transparent and play no role in the review and recommendation process.

3.2.9 TAB 8 – REFERENCES

3.2.9.1 List a minimum of three (3) references in Florida for which the proposer has provided Agent of Record services. Include the name of the organization, brief description of the project, name of contact person telephone number and email address.

Name	Contact Person	Number of Employees
City of St. Augustine (Ancillary Lines of Coverage, Wellness Strategy)	Donna Hayes, HR Director 904-825-1013 dhayes@citystaug.com	428
Town of Orange Park (Medical and Ancillary, Wellness Strategy)	John Villanueva, Dir of Finance 904-278-3017 jvillanueva@townop.com	114
Jacksonville Port Authority (Ancillary Lines of Coverage, Wellness Strategy)	Kelly Harris, HR Generalist 904-357-3029 kelly.harris@jaxport.com	152
Flagler County (Medical and Ancillary, Wellness Strategy, Onsite Health Center Management)	Anita Stoker, Benefits & Wellness Manager 386-313-4034 astoker@flaglercounty.org	650

3.2.10 TAB 9 – ADDITIONAL FORMS

Proposers must compete and submit as part of its Proposal all of the following forms and/or documents

- *Proposer Qualifications*
- *Certification regarding debarment and suspension*
- *Drug Free workplace certification*

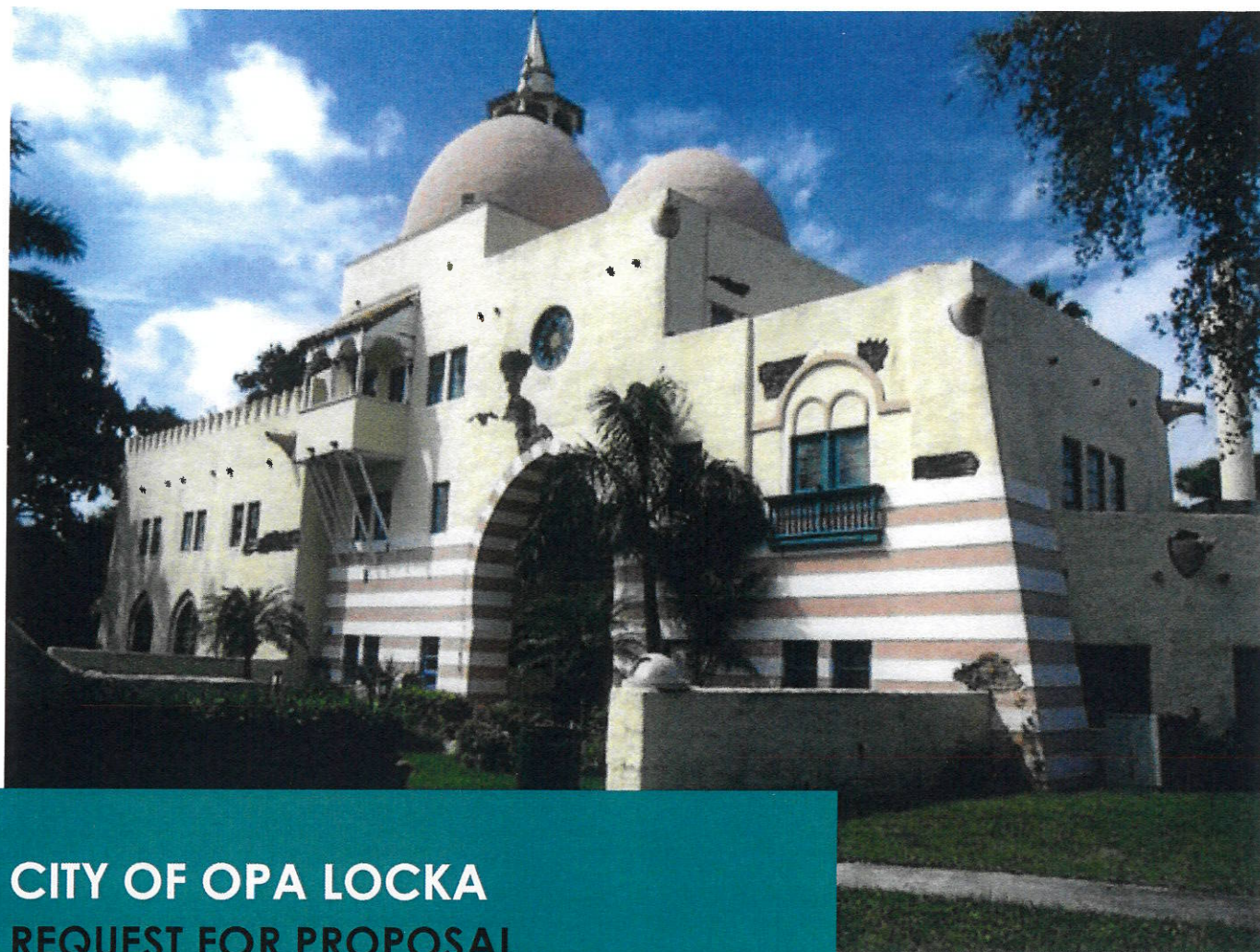


Exhibits

Any information regarding insurance coverage contained herein is intended only to provide you with a brief overview, not a comprehensive list of policy exclusions, limitations and conditions. The insurance policy issued will contain the specific terms, conditions, and exclusions of the coverage. Please read the entire policy carefully, including all endorsements. NFP and its subsidiaries or affiliates are not responsible for decisions or actions of any insurance company or intermediary, including those related to rating or pricing practices, coverage interpretations, post-policy audits, claims handling, or otherwise.

Information provided herein is for general informational purposes. NFP and its subsidiaries do not provide legal or tax advice and we recommend that our clients consult an attorney or tax professional. We believe the information is accurate, however, we make no warranty or guarantee regarding the accuracy or reliability of the content.

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CITY OF OPA LOCKA REQUEST FOR PROPOSAL

RFP No: 21-06291000

Agent of Record for Employee Benefit Program

Proposed by
National Marketing Group Services, Inc.
Roger Gonzalez



CITY OF
OPA LOCKA
FLORIDA

305-592-9926 | 7705 NW 48th Street, Suite 100, Doral, Florida 33166 | www.mynmgs.com

SECTION 1

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SECTION 2

LETTER OF TRANSMITTAL

June 20, 2021

John E. Pate
Office of the City Clerk
780 Fisherman Street,
4th Floor
Opa-Locka, FL 33054

RE: Request for Proposal, RFP No. 21-0629100 Agent of Record – Employee Benefit Program

Dear Mr. Manager:

National Marketing Group Services, Inc. is pleased to submit a proposal offer in response to the City of Opa-Locka RFP for Agent of Record. We have reviewed all questions with great care and provided thorough responses within. NMGS fully understands the requirements, terms, conditions, and overall scope of work. Through our extensive experience serving as Broker and Consultant for various Florida public and private sector entities, we are confident that we will not only meet, but exceed the City's needs regarding employee health benefits. In addition, we are able and willing to negotiate any other items that the City of Opa-Locka would like to incorporate into the final terms of agreement.

I founded NMGS in 1988 and our philosophy is rooted in three fundamental principles:

- **Experience-** Over 30 years of consistent and exemplary service to our community
- **Professionalism-** Combining knowledge through continuing education with ethical and core values to achieve positive outcomes
- **Integrity-** Honoring the basic principal "do what's best for your client"

As it relates to the scope of work and commitment to perform services within, NMGS has the onsite personnel, services platform, and management resources to meet and exceed those requested in the Scope of Services section of the attached RFP. NMGS's service team is both extensive and well qualified. By virtue of our organizational structure and service team deployment design, we can ensure efficient management of any employee benefits program. Our staff regularly attends educational seminars throughout the year and pursues independent studies to broaden their knowledge and keep pace with the current status of trends, coverage terms and product development. Our account managers are licensed insurance professionals and PPACA consulting specialists.



We strongly believe and emphasize that Wellness is a fundamental aspect in maintaining a healthier and happier workforce. It will also affect and improve the employer's bottom line by helping reduce their insurance premiums.

NMGS continuously helps shape the healthcare and business landscapes on a local and national level. We are constantly providing feedback to government and private insurance carriers on how to improve quality of coverage as well as contain costs. We are confident in our ability to perform the work outlined in our scope of services for the City of Opa-Locka.

We thank you for your review of our comprehensive response and appreciate the opportunity to bring innovative and affordable employee benefit solutions to the City of Opa-Locka.

Authorized to make representations on behalf of National Marketing Group Services, Inc.

Michelle Gonzalez-Febres
Vice President
7705 NW 48th Street Ste. 100
Doral, Florida 33166
786-262-6356

Roger Gonzalez III
Operations Manager
7705 NW 48th Street Ste. 100
Doral, Florida 33166
305-205-4482

Thank you for your trust.

Sincerely,

A handwritten signature in cursive script that reads 'Roger Gonzalez'.

Roger Gonzalez, Founder & President



SECTION 3

GENERAL INFORMATION

Name of Business.

National Marketing Group Services, Inc.

Mailing Address and Phone Number.

7705 NW 48th Street, Suite 100 Doral, Florida 33166

Names and contact information of persons to be contacted for information or services if different from name of person in charge.

Michelle Gonzalez-Febres, Roger Gonzalez III

Normal business hours.

9 AM – 4:30 PM, however, Opa-Locka will have direct access to the assigned Account Managers after regular working hours.

State if business is local, national, or international and indicate the business legal status (corporation, partnership, etc.).

State, Corporation

Give the date business was organized and/or incorporated, and where.

July 26, 1988, State Incorporated: Florida

Give the location of the office from which the work is to be done and the number of professional staff employees at that office.

Doral, Florida. Our office has a total of nine in-house employees.

Indicate whether the business is a parent or subsidiary in a group of firms/agencies. If it is, please state the name of the parent company.

N/A

State if the business is licensed, permitted and/or certified to do business in the State of Florida and attach copies of all such licenses issued to the business entity.

See next page for Local Business Tax Receipt and Agency License.



2019-2020
LOCAL BUSINESS TAX RECEIPT
CITY OF DORAL, FLORIDA
8401 Northwest 53rd Terrace
Doral, Florida 33166
(305) 593-6631

2020003539

MACHINES:
SEATS:
STATE LIC.#:
EMPLOYEES: 9
LICENSE FEE: \$60.00

213BUS BUSINESS SERVICES
FOR THE PERIOD COMMENCING OCTOBER 1, 2019
AND ENDING SEPTEMBER 30, 2020 LICENSED TO
ENGAGE IN THE FOLLOWING BUSINESS:
Business Name: **NATIONAL MARKETING GROUP SERVI**
DBA:
Address: 7705 NW 48 ST UNIT 100
DORAL, FL 33166

OFFICE USE ONLY, DRY USE ONLY, NO OUTSIDE DISPLAYS
Conditions: Chief Licensing Official

8401 NW 53rd Terrace, Doral, Florida 33166 • www.cityofdoral.com • 305-593-6631 • Fax 305-593-6616

001942

Local Business Tax Receipt
Miami-Dade County, State of Florida
-THIS IS NOT A BILL - DO NOT PAY

4322616

BUSINESS NAME/LOCATION
NATIONAL MARKETING GROUP SERVICES INC RENEWAL
7705 NW 48TH ST 100
DORAL FL 33166

RECEIPT NO
4511193

LBT
EXPIRES
SEPTEMBER 30, 2021
Must be displayed at place of business
Pursuant to County Code
Chapter 2A - Art. 9 & 10





FLORIDA DEPARTMENT OF FINANCIAL SERVICES
NATIONAL MARKETING GROUP SERVICES, INC.

7705 NW 48TH STREET SUITE 100
DORAL FL 33166

Agency License Number L068349

Location Number: 121340

Issued On 02/20/2014

Pursuant To Section 626.0428, Florida Statutes, This Agency Location Shall Be In The Active Full-Time Charge Of A Licensed And Appointed Agent Holding The Required Agent Licenses To Transact The Lines Of Insurance Being Handled At This Location.

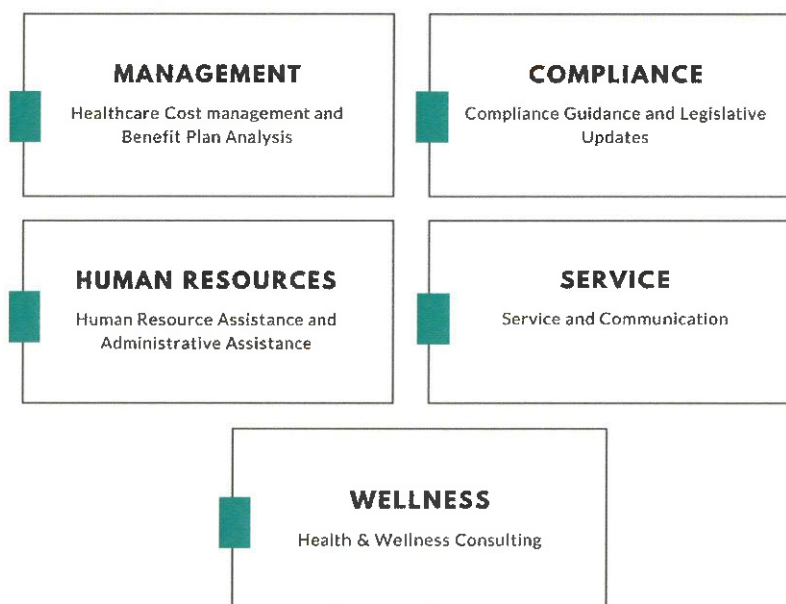
Pursuant To Subsection 626.172(4), Florida Statutes, Each Agency Location Must Display The License Prominently In A Manner That Makes It Clearly Visible To Any Customer Or Potential Customer Who Enters The Agency Location.

Jimmy Patronis
Chief Financial Officer
State of Florida

SECTION 4

PROJECT APPROACH

The program that the account team will be implementing when working with the City is a multi-tiered process that will be detailed in the following sections of this RFP and is highlighted by the five major components below.



- NMGS will provide a managing team of servicing representatives available to the City on a daily and ongoing basis. Each member of our staff will display the characteristics of our company philosophy...Experience, Professionalism, and Integrity. NMGS guarantees prompt responses and resolution on all issues by at least one of our representatives. The entire management of the account will be overseen by President, Roger Gonzalez.
- NMGS will provide an online benefits enrollment source that allows employees and employers to access, enroll and manage their benefits. This software's capabilities have served valuable to the human resources departments and finance departments, which is why we will proudly offer this service at no cost to the City of Opa-Locka. Employee Navigator allows the HR user to generate ad hoc reports ranging from basic employee demographic reports and benefit enrollment reports to comprehensive payroll deductions reports. The employee will have their own login to administer and view all their employee health benefits. The platform streamlines the new hire and open enrollment process for HR and the employee. The enrollment experience is self-serve and allows employees to review any changes to their annual contribution before completing their enrollment.

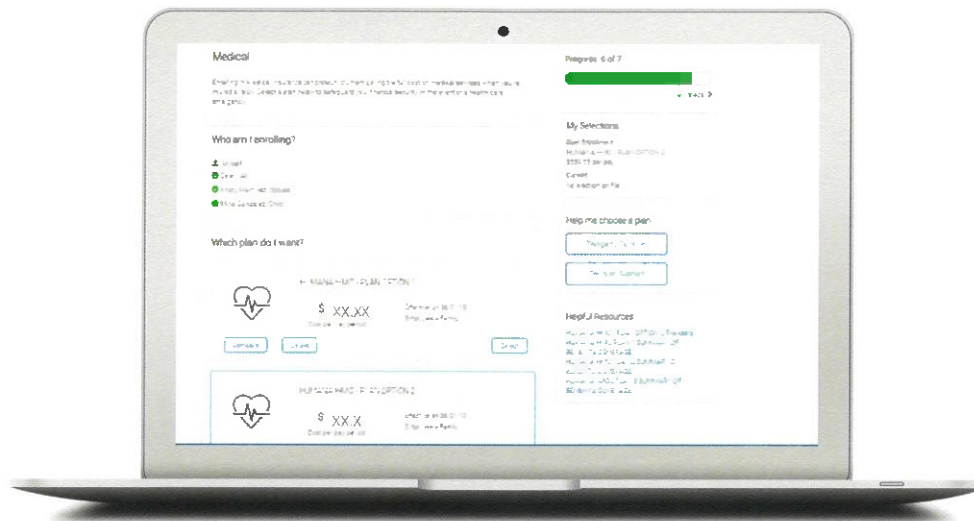


Exhibit A: Online Benefit Enrollment, Employee Navigator

- NMGS will solicit plan proposals and negotiate market rates with existing and alternate insurance carriers for annual renewals. The renewal process will begin **90 days prior to the renewal date**. NMGS will leverage wellness plan models, claims utilization reports, projected future trends, and alternate carrier quotes to help drive rates down. Due to our positive relationships and valued broker status with major insurance companies along with our extensive experience negotiating renewal rates, we are perfectly positioned to achieve positive renewal outcomes. NMGS will be heavily involved in all aspects of the renewal negotiation process to make the strongest plan recommendations for the City. The renewal presentation will be held **60-75 days prior** to renewal.
- NMGS will be directly involved with the entire open enrollment process. Once we have analyzed our renewal options and made a well-informed decision on the best available carrier and plan options, we will meet with HR to create an open enrollment schedule. Open enrollment meetings will **begin 30-45 days prior to renewal date** pending City council and management approval. Employees will have various times throughout the scheduled week to attend the benefits and open enrollment presentation. In this presentation, we'll discuss topics such as: wellness and preventive care, benefit plan design and costs, detailed carrier information, enrollment process, ACA compliance updates, and a demo employee enrollment demonstration. Once they have viewed the presentation, they will have a specific amount of time to login into their online portal and make their enrollment elections. Your account manager will be onsite all week to assist employees with any questions or concerns they might have. We will also inform the

applicable carriers and make sure they are onsite all week to help answer any questions and provide necessary materials.

- NMGS will analyze claims utilization reports and cost saving options on a quarterly basis throughout the year. Our analysis will involve considering fully insured options vs. self-insured, implementing wellness programs to reduce employee utilization that will provide carriers with valuable information during the rating process, as well as restructuring benefit plans to lower monthly premiums. We will continuously look for alternative programs both traditional and innovative to ensure that the City of Opa-Locka has exhausted all options before making any decisions.
- NMGS will prepare Employee Benefit Guides detailing, but not limited to, the following: pertinent provider information, health plan benefits, dental and vision plan overview, life insurance, disability insurance, qualifying events, and important contact information. **Employee Benefit Guides will be provided to group for approval within 45-60 days before the start of open enrollment.**



Exhibit B: Employee Benefits Guide

- NMGS will maintain an active and ongoing relationship with the service providers/insurance carriers to ensure smooth operation and delivery of benefits as well as facilitating prompt review and resolution of plan and claims administration issues. NMGS will have an account manager that speaks with each of the carrier representatives

on a weekly basis to ensure all aspects of the City's coverages are running efficiently. We will keep close contact with said reps to make sure all enrollments, billing issues and claims are resolved promptly and without error.

- NMGS will make regularly scheduled visits to the City to respond to questions, solve problems, hold periodical wellness talks and assist with benefit administration. Your account manager will visit the City monthly to conduct new hire orientation meetings and educate employees on their benefit plans, wellness, enrollment process, provider search and how to effectively manage their insurance plans. Additionally, NMGS will visit with HR on a quarterly basis to discuss claims utilization, compliance issues, and any other pending topics. Our local presence makes regularly scheduled visits consistently and readily available.
- NMGS will assist with the development and design of year-round informational materials, payroll stuffers, employee meetings, annual wellness fair etc. to maximize employees' knowledge and understanding of how to be the best consumer of the employee benefits plan. We will create and design with the City's approval: benefit booklets, communication materials, event marketing materials, and newsletters for distribution and posting on the employee's online enrollment portal. NMGS will assist HR in coordinating the annual wellness fair and design and print the marketing flyers and passports.



Exhibit C: Sample Wellness Campaign Material

- NMGS will inform the City's Human Resources Department of changing legislation and legal decisions affecting employee benefits and advise on methods to comply with these changes. We will provide the City with monthly newsletters containing valuable information pertaining to HIPPA, COBRA, Medicare, Healthcare Reform and other similar

state and federal laws. NMGS will also provide guidance on laws pertaining to benefit administration, domestic partnership, same sex marriage and dependent coverage.

- NMGS will assist the Human Resources and Finance Departments with the dispute, changes, and reconciliation of billing invoices. Our online enrollment tool, Employee Navigator, will generate reports that HR can use to reconcile against carrier bills. Your account manager will personally process all new hire enrollments and terminations. NMGS will work directly with the carrier to ensure any errors and/or omissions are corrected immediately. Furthermore, your account manager will send written confirmations of each enrollment and termination to confirm all the above have been processed correctly and to minimize billing errors.
- NMGS will diligently perform any other duties critical to the proper formation of the City's benefits package and its optimal operation and participation. This includes providing all of the above as well as intangible services that cannot be necessarily quantified but can certainly be acknowledged. Providing personalized attention, immediate responsiveness, and handling the City's account with pride and integrity.
- In addition to comprehensive benefit analysis and strategic planning, employee wellness and education have served of high value in minimizing the financial impact of rising healthcare costs. We have designed an innovative approach that can be easily attained by the employees.

NMGS partnered with Mount Sinai Medical Center and other local hospitals to help sponsor employee health fairs. The comprehensive health fairs have included educational seminars on various health topics, health risk assessments, skin cancer screenings, and cholesterol and diabetes screenings performed by physicians. Once their blood work is complete and the results have been sent back to the Primary Care Physician, HR receives a detailed report with general information on the test results. The Human Resources Department does not receive any personal medical information. **These health screening reports are utilized to track the group's collective wellness position. In doing so, it allows NMGS to negotiate more favorable renewal rates.**

Employee education coupled with a wellness approach is the unsung hero of benefits programs. Employee education has deemed valuable when an employee, encouraged to go get a preventative screening, catches the early onset of a potential long-term condition. Preventative health screening education may have in part saved that employees life and saved the Town thousands in claims costs.

SECTION 5 EXPERIENCE AND QUALIFICATIONS



NMGS HAS BEEN IN BUSINESS FOR OVER 30 YEARS

The Proposer shall have extensive experience, expertise and reliability in Municipal Agent of Record services; established reputation, particularly with governmental clients; Proposer must have a minimum of five (5) years of consecutive and successful experience in the aforementioned areas.

Proposer's track record in providing Agent of Record services to governmental agencies as well as private entities (Please provide a list of current and relevant projects, including client names, titles, phone numbers and email address. Please ensure that contact information is current.)

PERTINENT ACCOUNTS

City of Doral

Medical, Dental, Vision, Life/AD&D, Long-Term Disability & Supplemental
2011 - Present

Village of Key Biscayne

Medical, Dental, Vision, Life/AD&D and Long-Term Disability
2012 - Present

BEIN Sports

Medical, Dental, Vision, Life/AD&D and Supplemental
2015- Present

Integrated Homecare Acquisitions

Medical, Dental, Vision, Life/AD&D, and Disability & Supplemental
2015 -Present

Village of Pinecrest

Medical, Dental, Vision, Life/AD&D, and Long-Term Disability
2020 – Present

Peter Glenn

Medical, Dental, Vision, Life
2010 - Present

NMGS has over 25 years of experience working with public sector clients. At NMGS, we take pride in servicing the employee benefit needs of our local municipal entities.

We have experience with the most intricate facets of the rating process, carrier contracting methodologies, fixed cost development, PPACA compliance law, insurance benefit plans, enrollment process and Human Resources.



With state-of-the-art technology platforms, we deliver valued customer service, informational data, and planning tools; we are perfectly positioned to assist Human Resource departments manage all facets of the employee benefits arena.



NMGS has extensive experience in handling various funding arrangement plans including fully insured, level funded, self-insured, HSA's, HRA's, and FSA's. We partner with leading experts of various insurance carriers, financial institutions, and third-party administrators to manage these different types of arrangements as efficiently and effectively as possible. Through these relationships we can leverage our industry influence to negotiate the best available market rates. We also realize the need some clients may have for a more specialized level of service to cover a broader spectrum of employee management and insurance benefits. That is why NMGS has partnered with underwriters, medical professionals, actuaries, and legal counsel to provide clients with a wide array of value-added consulting services.

Education has become an increasingly important factor in managing employee benefits. With all the legislative and regulatory changes due to PPACA, we have become a resource for our group clients and somewhat of a strategist for our members. We put forth maximum effort in providing valuable resources to help employees make more cost and time efficient decisions when receiving medical care. For example, statistically speaking, emergency room bills are 3-5 times higher than urgent care centers. By letting employees know to visit urgent care centers as opposed to the emergency room we can lower medical loss ratios significantly. NMGS facilitates this process by providing members with a list of urgent care facilities in their geographic area. Another example includes informing employees about facilities offering low cost prescription drugs without proof of insurance. If employees can obtain free or very low-cost prescriptions without using their insurance plans, we can reduce the amount of overall claim submissions which will in turn keep claims experience down.

Our goal is to ensure that employees understand how to be the best consumer of their employee benefits plan.

The following are some examples of our successful experience in assisting local government maximize benefits for employees while minimizing financial impact of rising health insurance premiums:

EXAMPLE 1

City of Doral

8401 NW 53rd Terrace Doral, 33166

John Prats, HR Director

John.Prats@cityofdoral.com

305-593-6760



Since NMGS was awarded the RFP in 2011, we have provided superior service and delivered substantial administrative and premium savings to the City of Doral. In that time, NMGS has saved the City of Doral more than \$3.5 million in premium (from initial carrier offers) while maintaining or improving upon the benefits offered to employees. Our educational services have been successful in highlighting the cost and time savings opportunities when using Urgent Care Center (UCC) compared to Emergency Room (ER), generic vs. brand name prescriptions, and the importance of preventive health screenings.

In 2019, the initial renewal offer from Aetna came in at 15% above current due to higher than expected hospitalizations as well as other market trend factors. Through discussions with our Aetna renewal and underwriting team, NMGS negotiated the increase down to 5.5%. By analyzing and drilling down into the claims data, we were able to communicate with underwriters that many of the hospitalizations were shock claims as opposed to ongoing conditions and shouldn't have a significant future impact. In addition, we bundled the dental insurance with the medical to receive an additional 2% discount off the medical rates for a final offer of 3.5% above current.

The exhibit below illustrates the successful history of achieving well below average increase for the City.

City of Doral			
	2018/2019	2019/2020	2020/2021
<i>Initial</i>	<u>25%</u>	<u>15%</u>	<u>11.7%</u>
<i>Final</i>	<u>12%</u>	<u>3.5%</u>	<u>5%</u>
Wellness Budget	Negotiated \$25,000	Negotiated \$25,000	Negotiated \$25,000
Benefit Change	No changes to benefits	No changes to benefits	No changes to benefits
Results	<i>Negotiated Savings</i> \$627,890	<i>Negotiated Savings</i> \$648,624	<i>Negotiated Savings</i> \$386,857

Chart 4: Displays the yearly changes in renewal costs by percentage for the City of Doral

NMGS also provided additional savings for the ancillary benefits maintaining level rates for 9 years for dental, vision, life, and short and long-term disability. In 2017 NMGS moved the Life and Disability

benefits to Aetna in order to obtain and package discount with the medical insurance. This resulted in a **7.5%** savings across the life, short-term and long-term disability plans. Additionally, we obtained a \$12,000 one-month credit for the City for moving these plans to Aetna.

Lastly, since 2010 NMGS has collaborated with the City to implement a consistent and well managed wellness program that includes health fairs, lunch and learns, incentive programs, fitness sessions and onsite medical screenings. *Our efforts led to the City being nominated for the Florida Worksite Wellness Award for the last four years as well as winning several other awards such as Healthy Weight Champions, recognition as a Platinum Level Fit-Friendly Worksite by the American Heart Association's initiative and recognition as a 2020 Workplace Well-being Gold Winner by Aetna*



EXAMPLE 2

Village of Key Biscayne

88 W. McIntyre Street, Key Biscayne, Florida 33149

Juan Gutierrez, Director of Human Resources

jcgutierrez@keybiscayne.fl.gov

305-365-8904



In 2010, National Marketing Group Services, Inc. was working with The Village of Key Biscayne as an outside consultant. During this time the Village was insured with AvMed. In 2011 NMGS became the Agent of Record for The Village of Key Biscayne to assist them in implementing a more cost-effective health insurance program. The first step was to move the policy effective date to align with the Village fiscal year, as the plan year began May 1st. At the time, the existing health insurance provider proposed a renewal increase of +15.8%. Based on our review and analysis of their program, we felt the proposed increase was unreasonable. NMGS recommended a bid process to obtain competitive proposals. As a result of an RFP process, NMGS was successful in negotiating an +8.1% renewal and a 17-month rate guarantee while transitioning a new carrier. This change was successful not only in simplifying the budget process and plan administration, but also saved the Village more than 8% in their health insurance premium.

In October 2019, the Village's renewal came in with a 23% increase; additionally, the Village was also looking to provide more plan options to its employee population. By closely monitoring claims experience and anticipating the potential cost impact of the health care reform mandates, NMGS recommended that the Village bid its program for the 10/1/2019 policy year. The RFP resulted in the Village moving its health insurance coverage to an alternate carrier, for a combined 8.57% **below** current rate. In addition, employees benefited from an enhanced schedule of benefits while the entity benefited from the significant cost savings. Overall, NMGS was successful in saving the Village over \$286,000 in their health insurance premium.

Village of Key Biscayne					
	2017/2018	2018/2019	2019/2020		2020/2021
<i>Initial</i>	<u>12.7%</u>	<u>18.0%</u>	<u>23.00%</u>		HMO: <u>13% Increase</u> POS: <u>15% Increase</u>
<i>Final</i>	<u>2.94%</u>	<u>7.2%</u>	HMO: <u>11.94% below current rate</u>	PPO <u>5.21% below current rate</u>	HMO: Negotiated down to 6.6% POS: Negotiated down to 7.1%
Wellness Budget	Negotiated \$5,000	Negotiated \$5,000	Negotiated \$5,000		Negotiated \$5,000
Benefit Change	No change to benefits	Addendum to benefit plan: \$0 cost outpatient behavioral health/substance abuse on all plans	Transition to new carrier: Enhanced PPO, advanced major diagnostics. Lowered deductible for the employee by \$1,500.		No change to benefits.
Results	Negotiated Savings \$102,510.20	Negotiated Savings \$152,850	Negotiated Savings \$286,722.84		Negotiated Savings \$97,354.80

Chart 1: Displays the yearly changes in renewal costs by percentage for the Village of Key Biscayne since 2017.

EXAMPLE 3

BeIN Sports LLC

7291 NW 74th St, Medley, FL 33166

Raquel Torres, HR Director

Raquel.torres@bein.net

305-777-1900

Carolina Villalba, HR Generalist

Villalbac@bein.net

305-777-1900



In May 2020, beIN Sports' current health insurance carrier, United Healthcare, presented renewal rates at 44% over the current rates. We used our in-house team of analysts and actuaries to truly understand the underlying issues that were driving up these claims. This helped build a sustainable benefit strategy. We also looked at changing some of the benefit structures in order to lower cost and mitigate risk.

NMGS sent the beIN Sports group out to bid. We requested alternate proposals from: Aetna, AvMed, Cigna, FL Blue & Humana. Aetna declined to quote as they were well over the renewal rates. Amongst the other carriers, Cigna offered the most competitive rates & benefits package. Our recommendation was to transition their employees to Cigna resulting in a 3% increase from current rates.

BEIN Sports				
	2017/2018	2018/2019	2019/2020	2020/2021
<i>Initial</i>	<u>19%</u>	<u>Rate Pass</u>	<u>39%</u>	<u>44%</u>
<i>Final</i>	<u>2% below current rate</u>	<u>12% below current rate</u>	22.0%	3%
Wellness Budget	Negotiated \$5,000	Negotiated \$5,000	Negotiated \$10,000	Negotiated \$7,500
Benefit Change	Changed Carrier, Minor changes to benefits	No changes to benefits	Minor changes to benefits	Carrier change, Same benefits
Results	<i>Savings from renewal \$162,839</i>	<i>Negotiated Savings \$161,772</i>	<i>Savings from renewal \$139,919</i>	<i>Savings from renewal \$402,060</i>

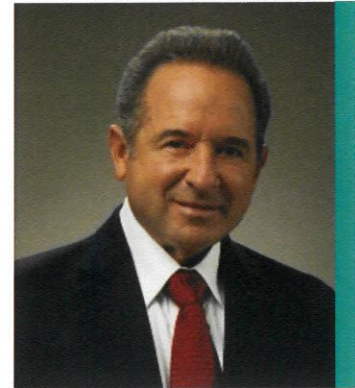
Chart 1: Displays the yearly changes in renewal costs by percentage for beIN Sports group since 2017.

PRINCIPAL OFFICERS

Roger Gonzalez Sr.

Founder & President | Doral, FL

Roger has been in the insurance industry since 1969 and has successfully grown the NMGS business for the last 32 years. Roger holds a 2-15 Health, Life and Variable annuities license. His areas of expertise are in carrier contract negotiations and client relations. His role and responsibilities include:



- Overseeing the carrier rating process to make sure clients are obtaining the best possible pricing from insurance companies
- Negotiating initial and renewal rates based on various information models
- Keeping a constant and open communication with current carrier to ensure client is receiving best possible service and benefits i.e. health fair budget, up to date utilization reports, proper underwriting process, and claims resolution
- Maintaining a presence with the client to establish and build professional relationships

Michelle Gonzalez-Febres

Vice President | Doral, FL



Michelle Gonzalez-Febres earned a Bachelor of Science Degree in Business Administration and Marketing from Nova Southeastern University. Michelle joined NMGS in 1998 when she first obtained her 2-15 insurance license (Life, Health and Variable Annuities). Her experience includes providing analysis of benefit plans and claims utilization, oversight of the evaluation process, and the management of various funding arrangements. With her years of experience and growth in the sales arena, Michelle brings a passion for engaging and educating hundreds of employees in the public and private sector. In 2013, Michelle was awarded Hispanic Executive of the Year by the Chamber of Commerce.

Michelle's distinguished civic efforts include community-building and empowering the youth. She is currently the Chairwoman for the Overtown Youth Center, an organization that raises funds through community efforts to provide afterschool education and sports programs to the children in Overtown and the neighboring communities.

Her role and responsibilities include:

- Assisting with the initial and renewal rate negotiation process
- Putting together benefit booklets, Stewardship and RFP/RFQ reports
- Reconciling billing issues
- Communicating with HR to resolve any pending issues

Roger Gonzalez III

Operations Manager | Doral, Florida

Roger Gonzalez III is the Operations Manager for National Marketing Group Services, Inc. He is responsible for all group business submitted to the agency. This includes preparation of all group proposals and sales presentation packages. He administers the underwriting process and provides customer service to all clients. Roger has been in the insurance industry for over 20 years. These years of experience have allowed him to build solid relationships with our carriers. His experience provides our clients with the expertise needed to service their employees and makes sure that all service issues are resolved within a timely manner. Mr. Gonzalez currently coordinates and manages the National Marketing Group Service staff that services over 200 accounts in the Tri County area.



His role and responsibilities include:

- Developing sophisticated benefits designs and renewal strategies
- Working directly with HR to manage and reconcile all ongoing benefit and billing issues
- Conducting plan performance/administration analysis
- Managing all enrollments, terminations, claims and COBRA submissions
- Conducting monthly orientation meetings to educate and inform new hires of their benefits and the enrollment process
- Overseeing all aspects of the online Benefits Administration portal
- Ensuring all compliance documents are up to date and posted in a timely manner

SECTION 6 SCHEDULE

NMGS' seasoned and experienced analysts review and evaluate each client's plan performance monthly, with further extensive analysis performed at scheduled intervals, typically annually. We also compile and present concise and comprehensive plan performance reports that provide committee members and decision makers with the knowledge necessary to make informed program recommendations and decisions. Our consulting process typically includes the following steps:

National Marketing Group Services / Annual Consulting Strategy

Phase 1: Gather Information/Objectives

Result: Identify shortcomings and competitive welfare programs while maintaining the group's operational objectives.

Phase 2: Research available alternatives and develop solutions

Result: Obtain optimal plan pricing with the "best in class" providers and develop a benefit package that meets all needs identified by client and broker

Phase 3: Review and Recommend final options

Result: Provide Cost savings, better risk coverage and a benefit program that works across the board for all employees.

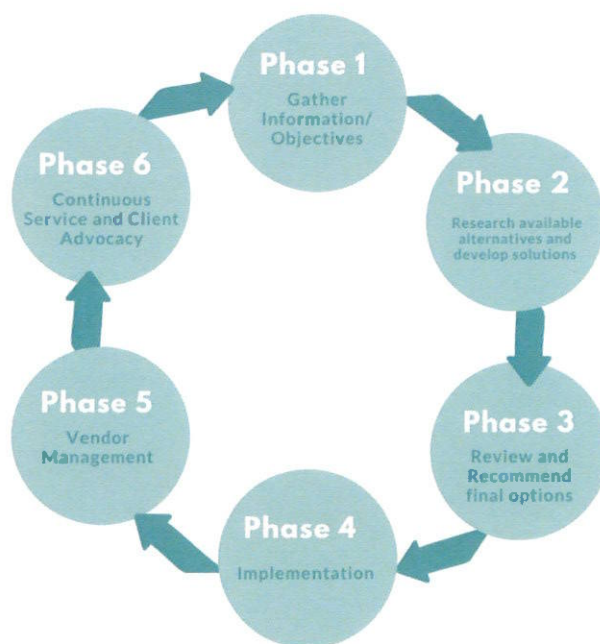
Phase 4: Implementation

Result: A seamless enrollment process for the employees and the administration with minimal, if any, disruption to the employee's benefits.

Phase 5: Vendor Management

Result: Consistent contact between client consultant and vendor to close all gaps during and after implementation.

Phase 6: Continuous Service and Client Advocacy



Result: Increased employee knowledge and education to minimize service issues and maximize insurance benefits. We will work closely with client to manage the risk and wellbeing of your employees and leaders.

NMGS is deeply involved in all program implementations and new hire and annual open enrollments. Our team will handle all areas of implementing and renewing all lines of employee benefits coverage.

Program Start Date



Program start day can begin as early as August 1st.

Anticipated Program Completion Date



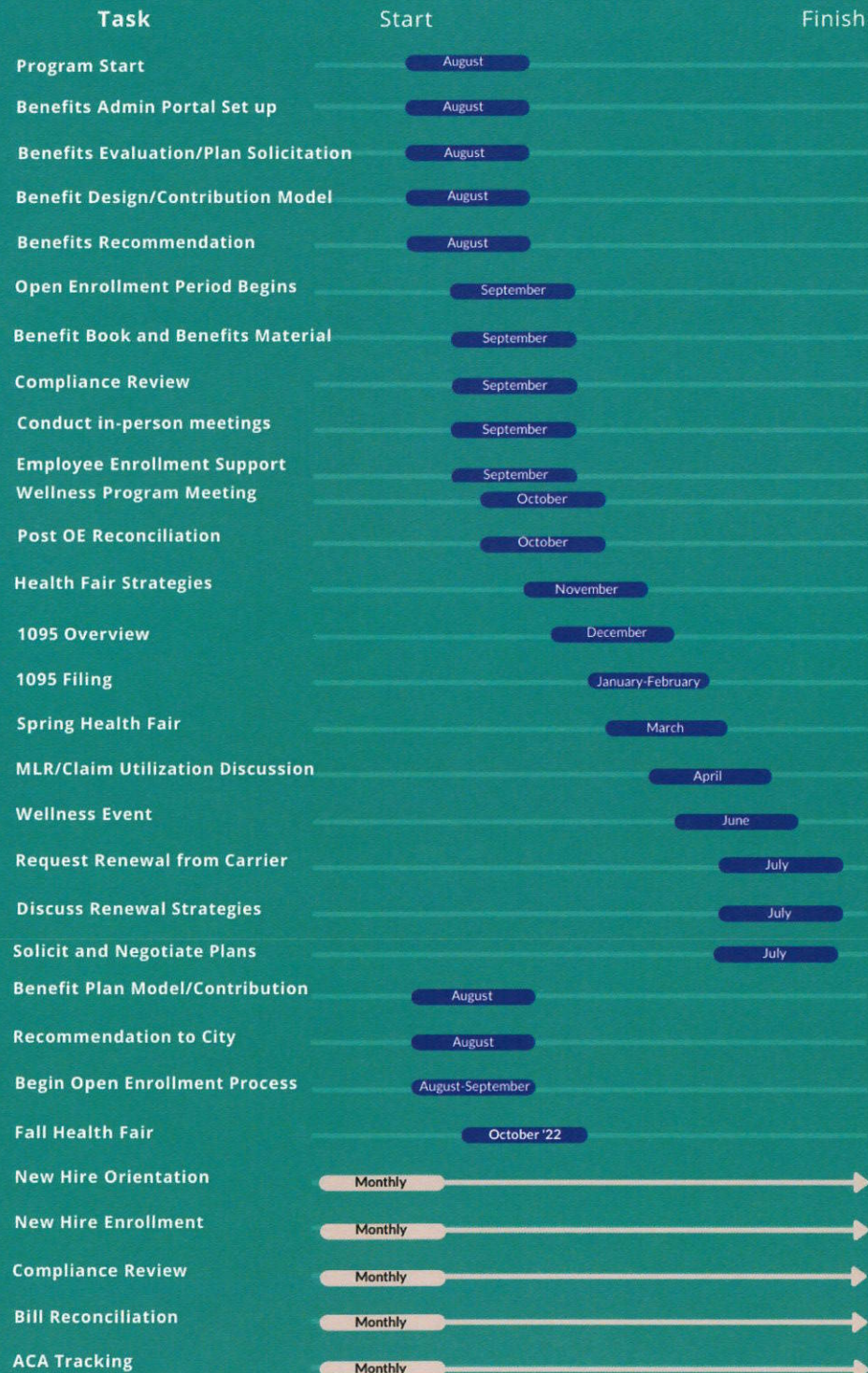
The intended goal is to complete online portal implementation, renewal process (beginning with solicitation, negotiation, recommendation), and open enrollment communicative material by August 31st to ensure a timely open enrollment period.

Please see anticipated program schedule on page 24.





CITY OF OPA LOCKA Program Schedule At-a-Glance





RFP NO: 21-0629100
PRICE PROPOSAL FORM

AGENT OF RECORD FOR EMPLOYEE BENEFIT PROGRAMS

PROPOSER understands and agrees that the Contract Price is the lump sum to furnish and install all of the Work complete in place. Vendor's price will not be adjusted unless the CITY changes the scope of the Project after the Contract Date.

As such, the Vendor shall furnish all labor, materials, equipment, tools, superintendence and services necessary to provide a complete, in place Project for the Proposed Price of:

LUMP SUM PRICE: \$ 4%

SUBMITTED
THIS

23 DAY OF June 2021.

BID SUBMITTED BY:

National Marketing Group Services, Inc.

305-592-9926

Company

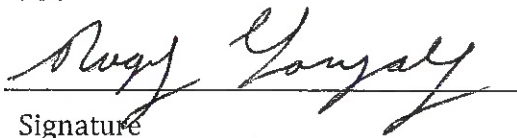
Telephone Number

Roger Gonzalez

305-597-6425

Name of Person Authorized to Submit
Bid

Fax Number



Roger@mynmgs.com

Signature

Email Address

Founder/President

Title



SECTION 8 REFERENCES

- City of Doral, 2011 – Present
Juan Carlos Bermudez, Mayor of the City of Doral
Juancarlos.bermudez@cityofdoral.com
(305) 593-6725

National Marketing Group Services, Inc. has served as the Agent of Record for the City of Doral since 2006. We have played a vital role in saving the City over \$3.5 million in premium since we formed partnership. Currently, we administer the employee welfare program to include health plan, dental, vision, life, FSA, and HSA. Major services provided to the City of Doral include Employee Health Fair coordination, wellness program consultation and ACA tracking and reporting.

- Village of Key Biscayne, 2012 - Present
Juan Gutierrez, Director of Human Resources
jcgutierrez@keybiscayne.fl.gov
305-365-8904

National Marketing Group Services, Inc. has served as the Agent of Record for the Village of Key Biscayne since 2011. Currently, we administer the employee welfare program to include health, dental, vision, life, disability and FSA options. Major services provided to the Village of Key Biscayne include Employee Health Fair coordination, hosting annual benefits fair, vendor contracting for on-site health and skin cancer screenings, and ACA reporting.

- Village of Pinecrest, 2020- Present
Mayra Sauleda, Office of the Village Manager
sauleda@pinecrest-fl.gov
305-234-2121

National Marketing Group Services, Inc. became the Agent of Record for the Village of Pinecrest in 2020. Currently, we administer the employee welfare program to include health, dental, life and disability products. Major services provided to the Village of Pinecrest include the implementation of an online benefits administration portal, ongoing bill reconciliations, and in-person new hire orientations.



RFP NO. 21-0629100

AGENT OF RECORD FOR EMPLOYEE BENEFIT PROGRAMS

PROPOSER QUALIFICATIONS

The Proposer, as a result of this proposal, MUST hold a County and/or Municipal Contractor's Occupational License in the area of their fixed business location. The following information MUST be completed and submitted with the proposal to be considered:

1. Legal Name and Address:

Name: National Marketing Group Services, IncAddress: 7705 NW 48th Street, Suite 100City, State, Zip: Doral, FL 33166 Phone/Fax: 305-592-9926 Fax: 305-597-64252. Check One: Corporation ☒ Partnership ☐ Individual ☐

3. If Corporation, state:

Date of Incorporation: 7/26/88 State in which Incorporated: Florida

4. If an out-of-state Corporation, currently authorized to do business in Florida, give date of such authorization: _____

5. Name and Title of Principal Officers

Date Elected:

Roger Gonzalez, PresidentJuly 26, 1988Michelle Gonzalez-Febres, Vice PresidentDecember 1, 20116. The length of time in business: 32 years7. The length of time (continuous) in business as a service organization in Florida:
32 years

8. Provide a list of at least three commercial or government references that the bidder has supplied service/commodities meeting the requirements of the City of Opa-locka specification, during the last twenty-four months. References provided on page 25 of the RFP

9. A copy of County and/or Municipal Occupational License(s)

Note: Information requested herein and submitted by the proposers will be analyzed by the City of Opa-locka and will be a factor considered in awarding any resulting contract. The purpose is to insure that the Contractors, in the sole opinion of the City of Opa-locka, can sufficiently and efficiently perform all the required services in a timely and satisfactory manner as will be required by the subject contract. If there are any terms and/or conditions that are in conflict, the most stringent requirement shall apply.



CITY OF OPA-LOCKA

CERTIFICATION REGARDING DEBARMENT, SUSPENSION PROPOSED DEBARMENT AND OTHER MATTERS OF RESPONSIBILITY

1. The Proposer certifies, to the best of its knowledge and belief, that the Proposer and/or any of its Principals:

A. Are not presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency.

B. Have not, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property; and

C. Are not presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph 1-B of this provision.

2. The Proposer has not, within a three-year period preceding this offer, had one or more contracts terminated for default by any City, State or Federal agency.

A. "Principals," for the purposes of this certification, means officers; directors; owners; partners; and, persons having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions). This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution Under Section 1001, Title 18, United States Code.

B. The Proposer shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Proposer learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

C. A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the Proposer's responsibility. Failure of the Proposer to furnish a certification or provide such additional information as requested by the Contracting Officer may render the Proposer non-responsive.

D. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of a Proposer is not required to exceed

that which is normally possessed by a prudent person in the ordinary course of business dealings.

E. The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Proposer knowingly rendered an erroneous certification, in addition to other remedies available to the Government, the Contracting Officer may terminate the contract resulting from this solicitation for default.

AS THE PERSON AUTHORIZED TO SIGN THE STATEMENT, I CERTIFY THAT THIS FIRM COMPLIES FULLY WITH THE ABOVE REQUIREMENTS.

Signature

Roger Gonzalez

Printed Name

Roger Gonzalez



**CITY OF OPA-LOCKA
RFP NO. 21-0629100**

DRUG-FREE WORKPLACE CERTIFICATION FORM

Whenever two (2) or more bids/proposals, which are equal with respect to price, quality, and service, are received by the CITY OF OPA-LOCKA for the procurement of commodities or contractual services, a bid/proposal received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of controlled substances is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in number (1).
4. In the statement specified in number (1), notify the employees that as a condition for working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction on or plea of guilty or no contest to any violation of Chapter 893, Florida Statutes or of any controlled substance law of the United States or any singular state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of Section 287.087, Florida Statutes.

This Certification is submitted by Roger Gonzalez the
President of National Marketing Group Services Inc.
 (Title/Position) (Name) (Company)

who does hereby certify that said Company has implemented a drug-free workplace program, which meets the requirements of Section 287.087, Florida Statutes, which are identified in numbers (1) through (6) above.

6/23/2021 Roger Gonzalez
 Date Signature



**CITY OF OPA-LOCKA
NON-COLLUSION AFFIDAVIT**

STATE OF FLORIDA - COUNTY OF MIAMI DADE

Roger Gonzalez being first duly sworn, deposes and says that:

- (1) He/She/They is/are the Owner
(Owner, Partner, Officer, Representative or Agent) of
National Marketing the PROPONENT that has submitted the attached proposal;
- (2) He/She/They is/are fully informed respecting the preparation and contents of the attached Proposal and of all pertinent circumstances respecting such Proposal;
- (3) Such Proposal is genuine and is not a collusive or sham Proposal;
- (4) Neither the said PROPONENT nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, have in any way colluded, conspired, connived or agreed, directly or indirectly, with any other PROPONENT, firm, or person to submit a collusive or sham Proposal in connection with the Work for which the attached Proposal has been submitted; or to refrain from Proposing in connection with such Work; or have in any manner, directly or indirectly, sought by agreement or collusion, or communication, or conference with any PROPONENT, firm, or person to fix any overhead, profit, or cost elements of the Proposal or of any other PROPONENT, or to fix any overhead, profit, or cost elements of the Proposed Price or the Proposed Price of any other PROPONENT, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the proposed Work;
- (5) The price or prices quoted in the attached Proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the PROPONENT or any other of its agents, representatives, owners, employees or parties of interest, including this affiant.

Signed, sealed and delivered in the presence of:

Alexandra Uderzo
Witness

[Signature]
Witness

By: Roger Gonzalez
Signature

Roger Gonzalez, Pres.
Print Name and Title



NON-DISCRIMINATION AFFIDAVIT

I, the undersigned, hereby duly sworn, depose and say that the organization, business or entity represented herein shall not discriminate against any person in its operations, activities or delivery of services under any agreement it enters into with the City of Opa-locka. The same shall affirmatively comply with all applicable provisions of federal, state and local equal employment laws and shall not engage in or commit any discriminatory practice against any person based on race, age, religion, color, gender, sexual orientation, national origin, marital status, physical or mental disability, political affiliation or any other factor which cannot be lawfully used as a basis for service delivery.

By: Rogey Yonzal
 Title: President

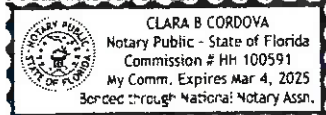
Sworn and subscribed before this

23 day of June, 2021

Clara B. Cordova
 Notary Public, State of Florida

Clara B. Cordova
 (Printed Name)

My commission expires: 3/4/2025





E-VERIFY

Effective January 1, 2021, public and private employers, contractors and subcontractors will be required to register with, and use of the E-verify system in order to verify the work authorization status of all newly hired employees. Vendor/Consultant/Contractor acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of:

- a) All persons employed by Vendor/Consultant/Contractor to perform employment duties within Florida during the term of the contract; and
- b) All persons (including sub-vendors/sub-consultants/sub-contractors) assigned by Vendor /Consultant/ Contractor to perform work pursuant to the contract with the Department. The Vendor /Consultant/ Contractor acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the contract is a condition of the contract with the City; and

By entering into a Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes but is not limited to utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The contractor shall maintain a copy of such affidavit for the duration of the contract. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. If t contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination. The Contractor acknowledges it is liable to the City for any additional costs as a result of termination of the contract due to Contractor's failure to comply with the provisions herein.



E-VERIFY FORM

Definitions:

"Contractor" means a person or entity that has entered or is attempting to enter into a contract with a public employer to provide labor, supplies, or services to such employer in exchange for salary, wages, or other remuneration.

"Subcontractor" means a person or entity that provides labor, supplies, or services to or for a contractor or another subcontractor in exchange for salary, wages, or other remuneration.

Effective January 1, 2021, public and private employers, contractors and subcontractors will begin required registration with, and use of the E-verify system in order to verify the work authorization status of all newly hired employees. Vendor/Consultant/Contractor acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of:

- a) All persons employed by Vendor/Consultant/Contractor to perform employment duties within Florida during the term of the contract; and
- b) All persons (including sub-vendors/subconsultants/subcontractors) assigned by Vendor/Consultant/Contractor to perform work pursuant to the contract with the Department. The Vendor/Consultant/Contractor acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the contract is a condition of the contract with the City of Opa-locka; and

Should vendor become successful Contractor awarded for the above-named project, by entering into this Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes but is not limited to utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The contractor shall maintain a copy of such affidavit for the duration of the contract. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. If this contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination.

Company Name: National Marketing Group Services, Inc.

Authorized Signature: _____

Print Name: _____

Title: Founder & President

Date: _____



SECTION 10

RENEWAL ANALYSIS

Proposed to
beIN Sports LLC

Presented on
May 15, 2020

RENEWAL ANALYSIS

PRESENTED BY

Will Machado

✉ Wmachado@argrms.com

Roger Gonzalez

✉ Roger3@mynmgs.com

NATIONAL MARKETING GROUP SERVICES, INC.



MEDICAL | DENTAL | VISION | INCOME PROTECTION | SUPPLEMENTAL GAP



SECTION 10

RENEWAL ANALYSIS

MEDICAL

CURRENT VS RENEWAL

Plan Name	United Healthcare (Current vs Renewal)							
	BA1Q/BXKC		FOVA/BXMY		AQON/BWOI		BAZS/BXNH	
	Product		NHP		United		NHP POS Flex(w Choice Plus Network)	
	Option		HMO		POS		POS	
	Benefits*		Network Single/Family		Network Single/Family		Network Single/Family	
	Office Copay		PCP \$30, SPC \$55		PCP \$20, SPC \$40		PCP \$10, SPC \$25	
	Inpatient Hospital		Deductible + Coinsurance		Deductible + Coinsurance		\$250	
	Outpatient Surgery		Deductible + Coinsurance		Deductible + Coinsurance		\$150	
	UC/ER/Major Diag Co		UC \$60, ER & Maj Diag- Ded + Coinsurance		UC \$60, ER \$250, Maj Diag \$250		UC \$75, ER \$250, Maj Diag- Ded + Coinsurance	
			UC \$30, ER \$100, Maj Diag \$125					
Deductible		\$2,500/\$5,000		\$1,500/\$4,500		\$750/\$1,500		
Coinsurance		80%		80%		80%		
Out-of-Pocket		\$5,000/\$10,000		\$4,500/\$9,000		\$2,750/\$5,500		
Pharmacy		\$10/\$50/\$80, 2.5x for MO		\$10/\$35/\$70, 2.5x for MO		\$10/\$35/\$70, 2.5x for MO		
		Out of Network Single/Family		Out of Network Single/Family		Out of Network Single/Family		
Deductible		N/A		N/A		\$1,500/\$3,000		
Coinsurance		N/A		N/A		60%		
Out of Pocket		N/A		N/A		\$5,500/\$11,000		
Enrollment								
Employee		57		6		1		
Employee + Spouse		11		5		0		
Employee + Child(ren)		7		5		0		
Employee + Family		8		3		0		
Total		83		19		1		
		Rates		Rates		Rates		
Rates		Current		Renewal		Current		
		Renewal				Renewal		
Employee		\$369.18		\$532.66		\$424.19		
Employee + Spouse		\$878.64		\$1,267.72		\$1,009.56		
Employee + Child(ren)		\$679.28		\$980.08		\$780.56		
Employee + Family		\$1,151.83		\$1,661.88		\$1,323.46		
Monthly Cost		\$44,677.90		\$64,462.14		\$15,466.12		

Combined Monthly Cost (Current))

\$81,386.68

Combined Monthly Cost (Renewal)

\$117,425.65

Change from Current

44.0%



SECTION 10

RENEWAL ANALYSIS

MEDICAL			ALTERNATE	
Cigna				
Plan Name	Open Access Plus 2500	Open Access Plus 1500	Open Access Plus 750	Open Access Plus Copay Only
Product	Cigna	Cigna	Cigna	Cigna
Option	PPO	PPO	PPO	PPO
Benefits*	Network Single/Family	Network Single/Family	Network Single/Family	Network Single/Family
Office Copay	PCP \$30, SPC \$55	PCP \$30, SPC \$55	PCP \$20, SPC \$40	PCP \$10, SPC \$25
Inpatient Hospital	Deductible + Coinsurance	Deductible + Coinsurance	Deductible + Coinsurance	\$250
Outpatient Surgery	Deductible + Coinsurance	Deductible + Coinsurance	Deductible + Coinsurance	\$150
UC/ER/Major Diag Co	UC \$60, ER & Maj Diag- Ded + Coinsurance	UC \$30, ER \$250, Maj Diag \$250	UC \$75, ER \$250, Maj Diag- Ded + Coinsurance	UC \$30, ER \$100, Maj Diag \$250
Deductible	\$2,500/\$5,000	\$1,500/\$4,500	\$750/\$1,500	N/A
Coinsurance	80%	80%	80%	100%
Out-of-Pocket	\$5,000/\$10,000	\$4,500/\$9,000	\$2,750/\$5,500	\$1,500/\$3,000
Pharmacy	\$10/\$50/\$80, 3x for MO	\$10/\$35/\$70, 3x for MO	\$10/\$35/\$70, 3x for MO	\$10/\$35/\$70, 3x for MO
	Out of Network Single/Family	Out of Network Single/Family	Out of Network Single/Family	Out of Network Single/Family
Deductible	N/A	N/A	\$1,500/\$3,000	\$500/\$1,500
Coinsurance	N/A	N/A	60%	60%
Out of Pocket	N/A	N/A	\$5,500/\$11,000	\$3,000/\$6,000
Enrollment				
Employee	57	6	1	4
Employee + Spouse	11	5	0	0
Employee + Child(ren)	7	5	0	2
Employee + Family	8	3	0	8
Total	83	19	1	14
	Rates	Rates	Rates	Rates
Rates	Open Access Network SureFit Network			
Employee	\$380.78	\$338.48	\$449.91	\$547.82
Employee + Spouse	\$883.79	\$791.78	\$1,043.80	\$1,274.68
Employee + Child(ren)	\$700.90	\$627.95	\$827.83	\$1,006.90
Employee + Family	\$1,188.51	\$1,064.84	\$1,403.70	\$1,709.14
Monthly Cost	\$45,840.53	\$40,917.31	\$16,268.71	\$21,264.82
Combined Monthly Cost (Current))			\$81,386.68	
Combined Monthly Cost (Alternate)			\$83,921.88	
Change from Current			3%	
Combined Monthly Cost (Alternate w SureFit)			\$78,998.66	
Change from Current with SureFit			-3%	
4				



SECTION 10

RENEWAL ANALYSIS

RENEWAL COST SUMMARY

belN Sports 2020 Renewal Cost Summary (Medical)

United Healthcare Current Monthly Premiums		
Total	Employee (EE)	Employer (ER)
\$81,387	\$14,934	\$66,453

United Healthcare Renewal Monthly Premiums		
Total	Employee (EE)	Employer (ER)
\$117,426	\$21,547	\$95,879

	Total (Renewal)	Employee (EE)	Employer (ER)
Monthly Difference from Current	\$36,039	\$6,613	\$29,426
Annual Difference from Current	\$432,468	\$79,356	\$353,112
Percentage Difference from Current	44%		

Cigna Option 1(Surefit Network) Monthly Premiums		
Total	Employee (EE)	Employer (ER)
\$78,999	\$16,278	\$62,721

	Total (Option 1)	Employee (EE)	Employer (ER)
Monthly Difference from Current	-\$2,388	\$1,344	-\$3,732
Annual Difference from Current	-\$28,656	\$16,128	-\$44,784
Percentage Difference from Current	-3%		

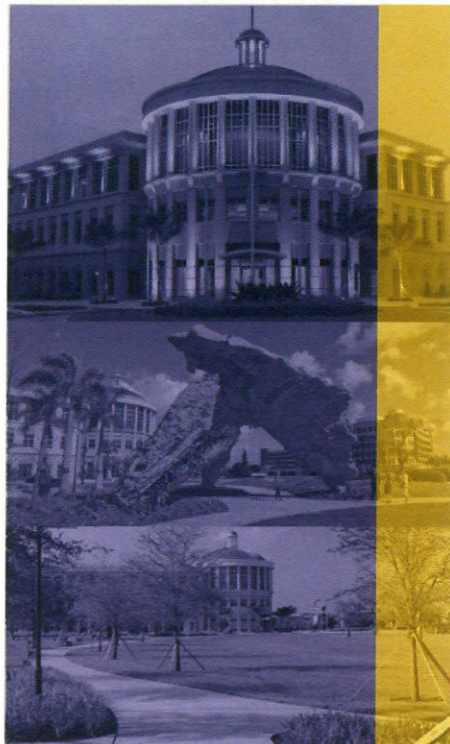
Cigna Option 2 Monthly Premiums		
Total	Employee (EE)	Employer (ER)
\$83,921	\$15,649	\$68,272

	Total (Option 2)	Employee (EE)	Employer (ER)
Monthly Difference from Current	\$2,534	\$715	\$1,819
Annual Difference from Current	\$30,408	\$8,580	\$21,828
Percentage Difference from Current	3%		



SECTION 10

RENEWAL PRESENTATION



CITY OF DORAL

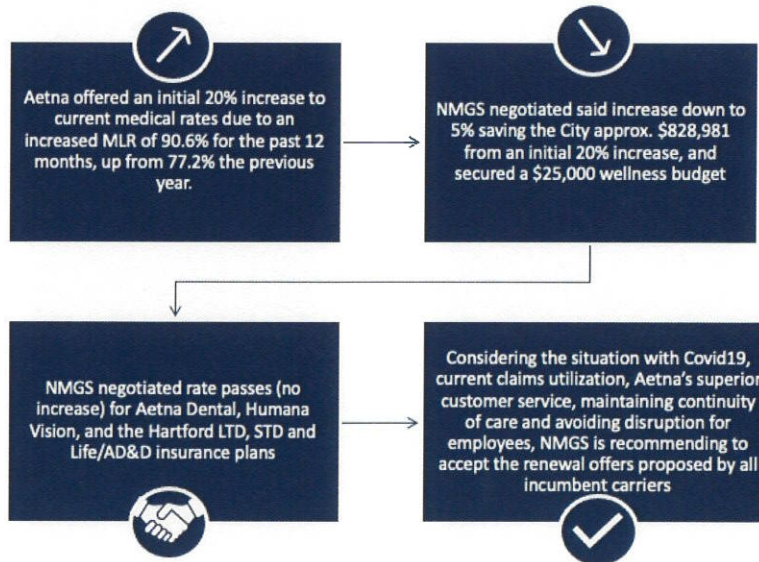
EMPLOYEE BENEFITS RENEWAL



FY 2020-2021

2020 INSURANCE RENEWALS

BRIEF OVERVIEW





SECTION 10 (Cont'd)

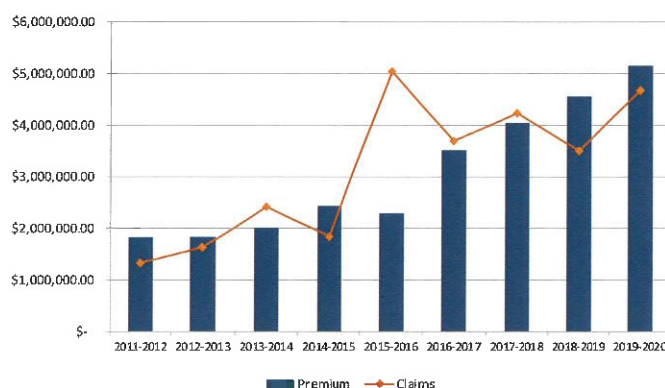
RENEWAL PRESENTATION

YEAR BY YEAR CLAIMS OVERVIEW

Claims Chart 2011-2020



City Of Doral: Premium vs Claims



- Claims have increased approx. 13% from 3.1.2019 – 03.01.2020
- 2020: Claims are still below premium paid, MLR is currently approx. 90.6%

Note: Data in 2020 is only available up to March 2020



MEDICAL CONTRIBUTION MODEL



FY 2020-2021

Aetna 10/1/2020	Type of Coverage	Monthly Rates	Doral Monthly Contribution	Employee Monthly Rate	Employee Per 26 Pay Periods
HSA OA EPO (Elect Choice)	Employee	\$712.36	\$712.36	\$0.00	\$0.00
	Employee + Spouse	\$1,424.87	\$1,262.03	\$162.84	\$75.16
	Employee + Children	\$1,282.29	\$1,135.74	\$146.55	\$67.64
	Family	\$2,137.24	\$1,831.92	\$305.32	\$140.92
OA EPO (Elect Choice)	Employee	\$862.81	\$821.72	\$41.09	\$18.96
	Employee + Spouse	\$1,725.80	\$1,364.21	\$361.59	\$166.89
	Employee + Children	\$1,553.11	\$1,227.70	\$325.41	\$150.19
	Family	\$2,588.62	\$2,046.25	\$542.37	\$250.32
OA POS	Employee	\$927.92	\$824.52	\$103.40	\$47.72
	Employee + Spouse	\$1,856.03	\$1,369.92	\$486.11	\$224.36
	Employee + Children	\$1,670.32	\$1,232.85	\$437.47	\$201.91
	Family	\$2,783.97	\$2,054.82	\$729.15	\$336.53

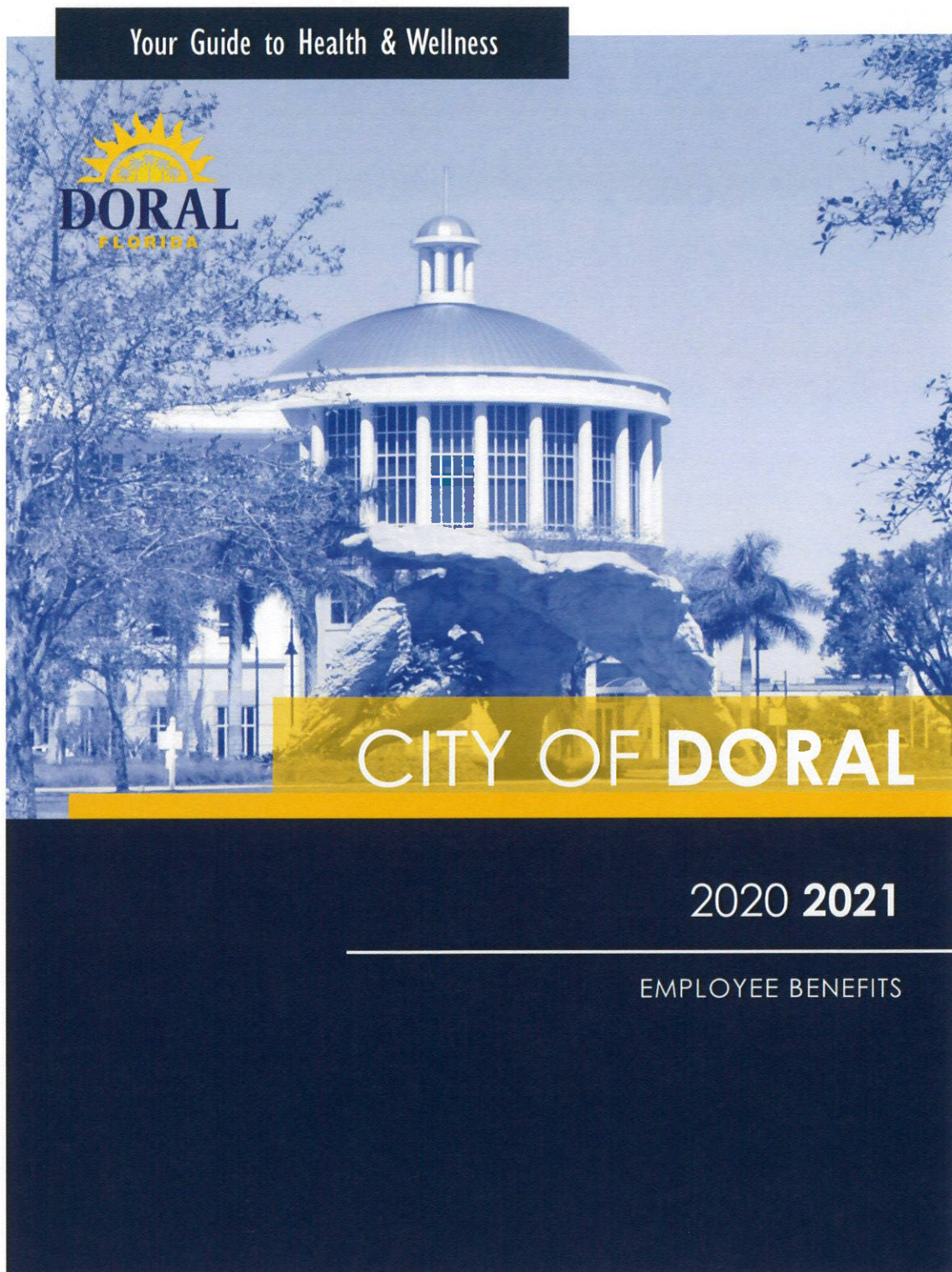
Model above displays employee deductions to remain the same as current

MONTHLY IMPACT TO EMPLOYEE RATES: NO CHANGE



SECTION 10

CURRENT BENEFITS GUIDE





SECTION 10 (Cont'd)

CURRENT BENEFITS GUIDE



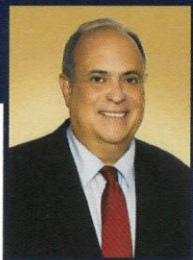
Message from the Mayor and City Manager

Dear Valued Team Member,

We would like to thank you for your service to the City of Doral. As a member of the Doral team, you undoubtedly play a vital role in ensuring that our residents, customers, and fellow team members have the best possible experience as they live, work, learn, and play in this great City. With this in mind, we strive to provide a well-rounded benefits program that meets the needs of you and your family.

This year we are once again proud to offer a range of plans that help protect you in the case of illness or injury. The details of these plans can be found within this handbook.

We are excited to offer you this wonderful benefits package and hope that you have a safe and productive year as part of our team.



Juan Carlos Bermudez
Mayor of Doral



Albert Childress
City Manager

"The groundwork of all happiness is good health."



SECTION 10 (Cont'd)

CURRENT BENEFITS GUIDE

CITY OF DORAL

The City's insurance plan begins
October 1, 2020—September 30, 2021

Eligibility

We offer a variety of health and insurance benefits to meet your needs. This enrollment guide is designed to help you understand the comprehensive medical, prescription, dental and vision coverage available for you and your family. You'll also learn about the available life and disability insurance options, including what's provided to you at no cost from the City of Doral.

ELIGIBILITY

New Hire Enrollment 1st of the month after 30 days

Termination End of employee termination month.

Eligible Dependents Spouse, Domestic Partners, biological child, adopted and/or stepchild, legal custody/guardianship

SPECIAL ENROLLMENT PERIOD

You may add/change/drop coverage during a Special Enrollment Period. You must notify HR within **30 days** of qualifying event.

Qualifying event — hour reduction, termination of coverage, marriage, divorce, newborn

COBRA- CONTINUED COVERAGE

The Consolidated Omnibus Budget Reconciliation Act (COBRA) requires most group health plans to provide a temporary continuation of group health coverage that otherwise might be terminated.

Upon termination, the employee will receive a package with options to enroll in coverage continuation for up to 18 months and/or 36 months with qualifying event.

BENEFITS AT-A-GLANCE

Medical

All Aetna plans are open access which means you do not have to obtain a referral to see a specialist.

City of Doral will sponsor 100% of the employee-only level of the base plan.

Dental

Optional PPO dental coverage is available for employee and/or dependents through Aetna.

Vision

Optional vision coverage is available for employee and/or dependents through Humana.

Life

100% Employer Paid
2X salary rounded to the next higher \$1,000, up to \$300,000.

Disability

STD: 60% of employee's weekly earnings up to a max of \$1,000

LTD: 60% of employee's monthly earnings up to a max of \$5,000 a month.

The summaries in this guide are not intended to supersede insurance contract or any other official or legal agreement. Where discrepancies may exist, your official contract controls.



SECTION 10 (Cont'd)

CURRENT BENEFITS GUIDE

ENROLLMENT PORTAL

1

Steps to Enroll

There are only **three opportunities** to select coverage or make changes to your coverage. This includes at the end of your new hire waiting period, during open enrollment, or in the event of a qualifying event (see page i)

1 Attend the open enrollment sessions—

Here you will learn about what's new for the upcoming 2020–2021 benefit year.

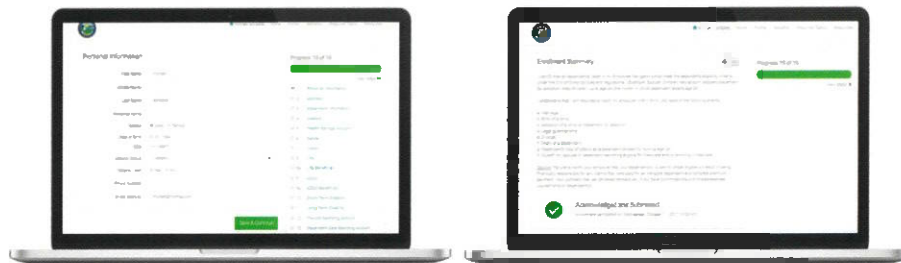
Note: Due to Covid-19, these sessions will be done virtually. Your HR department will provide details.

2 Login to your benefit administration portal— EMPLOYEE NAVIGATOR www.employeenavigator.com

Once you have logged in (*first time users are required to register*), update any personal or dependent information and review the benefits options.

- THIS IS YOUR OPPORTUNITY TO MAKE *PLAN CHANGES*, *ADD OR DROP DEPENDENTS*.

Reminder: Please review your home address and make sure all information is *up to date*.



3 Benefit Selection and E-Signature

Finalize your elections by clicking the enrollment acknowledgement button on the last page of the enrollment process.

Adding a Newborn

Adding a newborn to your health insurance? **Newborns must be added to your plan within 30 days of the date of birth.** If you add your newborn to your plan after 31 days, you may be responsible for the medical claims accrued during the uncovered period.



SECTION 10 (Cont'd)

CURRENT BENEFITS GUIDE

2

Employee Benefits Guide | Your 2020/2021 Benefits

www.cityofdoral.com

MEDICAL PLAN 1

aetna

HSA OPEN ACCESS ELECT CHOICE 1500

NETWORK: ELECT CHOICE EPO NATIONAL

	Calendar Year Deductible	\$1,500 Individual/\$3,000 Family
	Coinsurance	20%
	Max Out of Pocket	\$3,000 Individual/\$6,000 Family
OUTPATIENT CARE	PCP Office Visits	20% after deductible
	Specialists Services	
	Chiropractic Services	
	Phys/Speech/Occ Therapy (60 visits)	
	Outpatient Surgery	
	Minor Diagnostics/X-ray	
	CAT, PET scan, MRI and other Diagnostic Imaging	
WELLNESS	Physical Exams	\$0 Copay & not subject to deductible (1x per year)
	Well Woman Care	
	Mammogram	
HOSPITALS	Inpatient Hospital	20% after deductible
	Outpatient Hospital	
	Urgent Care	
	Emergency Room	20% after deductible
	Ambulance Services	
RX	Prescription Drugs	\$10/35/60 after deductible
	Mail Order Prescription (90)	\$25/87.50/150 after deductible
MENTAL HEALTH/ SUBSTANCE ABUSE	Mental Health Outpatient	20% after deductible
	Mental Health Inpatient	
	Substance Abuse Outpatient	
	Substance Abuse Inpatient	

City contributes 100% for the 'Employee Only' HDHP coverage



Virtual Medicine through Teladoc

Video chat with a doctor on your mobile device*, tablet or computer, and you can even get a prescription, if needed. Virtual visits can treat common health issues such as abdominal pain, acid reflux, strep or sore throat, cold, constipation, digestive issues and much more.





SECTION 10 (Cont'd)

CURRENT BENEFITS GUIDE

www.cityofdoral.com

Your 2020/2021 Benefits | Employee Benefits

5

aetna

DENTAL

AETNA DPPO	IN NETWORK	OUT OF NETWORK
Individual	\$50	\$50/\$50
Family Limit	3 PER FAMILY	
Waived For Preventative	YES	
CO-INSURANCE		
Type I: Preventative	100%	100%
Type II: Basic Services	90%	90%
Type III: Major Services	70%	70%
Type IV: Orthodontics	50%	50%
ANNUAL MAXIMUM BENEFIT	\$5,000	\$5,000
ORTHODONTIA	Child Only	
Lifetime Orthodontia Max	\$1,500	
Coinurance	50%	
Office visit copay	None	

Aetna Dental PPO provides flexibility in that you may choose a participating PPO dentist or you may use a dentist that is non-participating and still receive benefits.

Basic:	Gingivectomy (a)*	90%	Incision and drainage of abscess*	90%
	Amalgam (silver) fillings	90%	Uncomplicated extractions	90%
	Composite fillings (anterior teeth only)	90%	General anesthesia/intravenous sedation*	90%
	Stainless steel crowns	90%		
Major:	Inlays	70%	Full & partial dentures	70%
	Onlays	70%	Pontics	70%
	Crowns	70%	Root canal therapy, molar teeth	70%
	Anterior teeth / Bicuspid teeth	70%	Osseous surgery (a)*	70%
	Surgical removal of erupted tooth*	70%	Surgical removal of impacted tooth (partial bony/ full bony)*	70%
	Surgical removal of impacted tooth (soft tissue)*	70%		
			Implants	70%

*Certain services may be covered under the Medical Plan. Contact Member Services for more details.



Balance Billing

When you go out of network you may be subject to balance-billing, which means a provider can bill you the difference between what they normally charge and the allowed amount.



SECTION 10 (Cont'd)

CURRENT BENEFITS GUIDE

10

Employee Benefits Guide | Your 2020/2021 Benefits

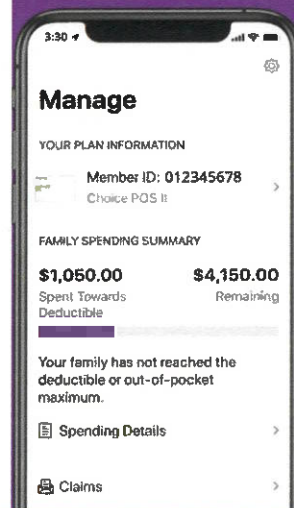
www.cityofdoral.com

AETNA MOBILE APPLICATION

Manage your health wherever.



Easily view your benefits
and progress
toward deductible



Download Aetna Mobile on
Google Play & Apple App Store



GoodRx



Search & Compare Prices

Find the lowest local prices for your prescriptions

Get Free Coupons

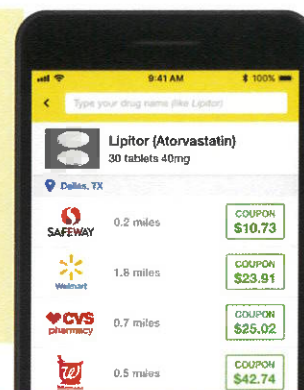
GoodRx coupons can save you up to 80% on your prescriptions at no cost to you

Mobile app available for your android or iPhone.

Download today and start saving!



www.goodrx.com





SECTION 10 (Cont'd)

CURRENT BENEFITS GUIDE

www.cityofdoral.com

Your 2020/2021 Benefits | Employee Benefits Guide

BENEFITS DIRECTORY & BROKER SUPPORT

Medical Coverage

Aetna Medical
1.800.445.5299
www.aetna.com
Group #: 835486

Aetna RX
1.888.792.3862

24/7 Nursing Line- Informed Health® Line
1.800.556.1555

Teladoc®
1.855.Teladoc (835-2362)

Dental Coverage

Aetna Dental
1.877.238.6200
www.aetna.com

Vision Coverage

Humana Vision
1.877.877.1051

Life & Income Protection

The Hartford Life & Disability
Customer Service: 1.800.523.2233
Disability Claims: 888.301.5615
(Hartford Ability Advantage)
Life Claims: 888.563.1124

Benefit Consultants

National Marketing Group Services, Inc
Michael Gonzalez
Michael@mynmgs.com
305.592.9926

Health & Wellbeing Resources

Aetna EAP
1.855.283.1915





SECTION 10
(Cont'd)

CURRENT BENEFITS GUIDE



VILLAGE OF KEY BISCAYNE

MEDICAL
DENTAL
VISION
DISABILITY
LIFE



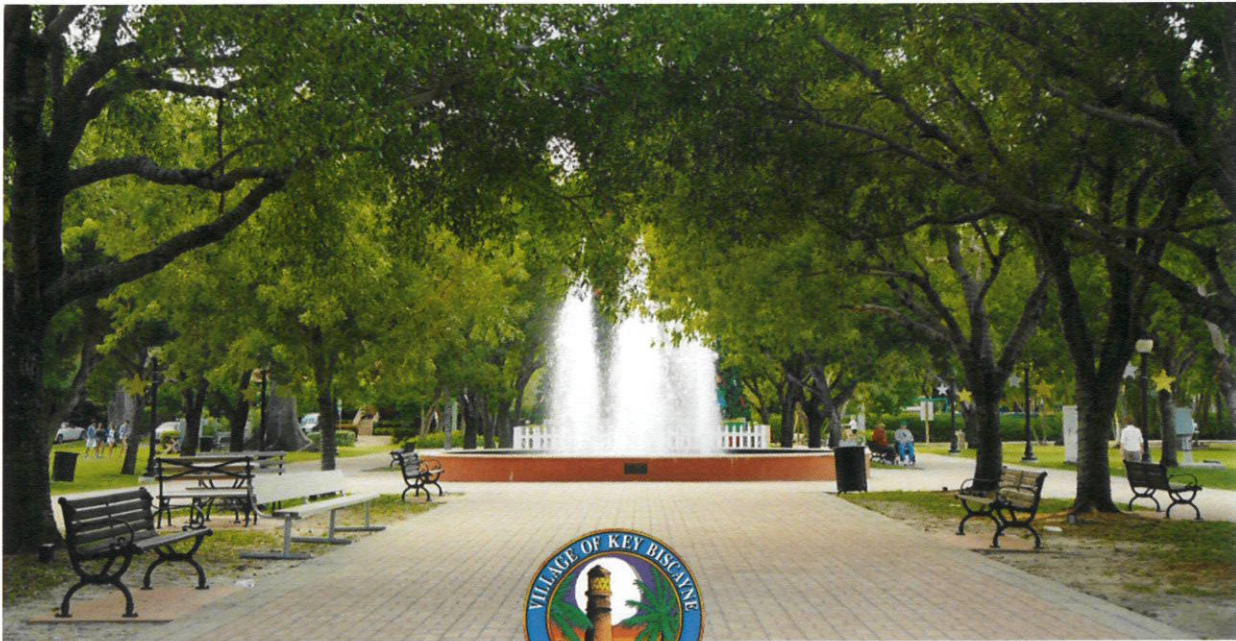
A GUIDE TO YOUR BENEFITS





SECTION 10 (Cont'd)

CURRENT BENEFITS GUIDE



Message from the Village Manager

To our esteemed employees—

Thank you for working as hard as you do, and for playing a significant role in accomplishing the Village's mission and serving the Key Biscayne community with the highest standards of integrity.

Our employee benefits package has been designed with the Village employees and their families in mind. We hope that the options found within the benefit package continue to provide a sense of protection and security for you and your *family*.

The Village of Key Biscayne is proud to offer its employees a generous employee benefits package that encompasses low out of pocket costs and financial protection. This enrollment guide is designed to help you navigate through the benefit options that are available to you and your family. You will also learn about the available life and disability insurance options, including what's provided to you at no cost from the Village of Key Biscayne.

The AvMed health insurance plans offered at Village of Key Biscayne meet the 'essential health benefits' provision as required under ACA.

Provisions required under ACA

✓ Minimum essential coverage

✓ Minimum Value Standard (60%)

✓ Affordability



SECTION 10 (Cont'd)

CURRENT BENEFITS GUIDE

MEDICAL PLAN 1

HEALTH MAINTENANCE ORGANIZATION



AvMed | HMO Base Plan

PRESCRIPTION TIERS

- Tier 1 (T1):**
Value Generic Drug
- Tier 2 (T2):**
Generic Drugs
- Tier 3 (T3):**
Preferred Brand Drugs
- Tier 4 (T4):**
Non-Preferred Brand Drug
- Tier 5 (T5):**
Specialty Drugs

IN-NETWORK

Calendar Year Deductible	\$500 Individual/ \$1,000 Family
Coinsurance	10%
Max Out of Pocket	\$3,500 Individual/ \$7,000 Family

OUTPATIENT CARE

PCP Office Visits	\$15 co-pay
Specialists Services	\$30 co-pay
Chiropractic Services	\$15 co-pay
Physical/Speech/Occ Therapy	\$30 co-pay
Outpatient Surgery	10% after deductible
Diagnostic Test (X-ray, blood work)	\$50 copay/visit; no charge for lab work at participating labs
CAT, PET scan, MRI and other diagnostic imaging	\$200 copay/visit Hospital/affiliated Facilities: \$400 copay/visit after deductible

WELLNESS

Physical Exams	\$0 Copay & not subject to deductible 1 x per year
Well Woman Care	
Mammogram	

HOSPITALS

Inpatient Hospital	10% after deductible
Outpatient Hospital	10% after deductible
Urgent Care	\$75 co-pay/visit Retail Clinic: \$15 copay/visit
Emergency Room	\$250 co-pay/visit
Ambulance Services	\$150 copay/one way ground

RX

Prescription Drugs	T1: \$3 / T2 \$9/ T3: \$25 / T4: \$50 / T5: 50% SMCS
Mail Order Prescription (90)	T1: \$7.50 / T2: \$22.50 / T3: \$62.50 / T4: \$125

MENTAL HEALTH/SUBSTANCE ABUSE

Mental Health Outpatient	\$0 co-pay
Mental Health Inpatient	0% after deductible
Substance Abuse Outpatient	\$0 co-pay
Substance Abuse Inpatient	0% after deductible



PLEASE NOTE: This summary is not intended to supersede insurance contract or any other agreement. Where discrepancies may exist, your official contract controls.



SECTION 10 (Cont'd)

CURRENT BENEFITS GUIDE

Employee Health & Wellness Information

Do you know where to get treated?

If ever in doubt, get
emergency care or
call 911 right away.

Finding the right place to get treated can help save time and money.

DR OFFICE	WALK-IN CLINICS	URGENT CARE	EMERGENCY ROOM
Preventative care	Minor Illnesses — i.e. Indigestion	Flu/cold	Allergic reactions to food, animals
Shots/immunizations	Minor Injuries — i.e. bug bites	Coughs and sore throat	Broken bones
Routine check-ups	Screenings and monitoring	High fevers	Chest pains
Flu	Skin conditions — acne, sores	Vomiting, diarrhea	Constant vomiting
Fever	Travel Health	Cuts and severe scrapes	Severe shortness of breath
Sore Throat	Women's Services	Minor injuries/sports injuries	Deep wounds
		Minor burns	Weakness or pain in leg or arm

The Content is not intended to be a substitute for professional medical advice, diagnosis, or treatment. Always seek the advice of your physician or other qualified health provider with any questions you may have regarding a medical condition. Never disregard professional medical advice or delay in seeking it because of material you have read in this book.

	Doctor's Office	Convenience Care (Ex. MinuteClinic)	Teladoc	Urgent Care	Emergency Room
What is the visit for?	Routine or preventive care, non-urgent care, or to manage a condition	Minor illnesses or injuries	Minor illnesses and injuries	Urgent but not serious or life-threatening	Immediate treatment for a serious or life threatening situation
What is the Wait?	 Appointment typically required	 Walk-in or same day appointment	 Appointment typically within an hour or less	 No appointment, wait times vary	 No appointment but could take hours for care
Estimated Cost?	 \$15-30	 \$15-30	 \$10-30	 \$20-75	 \$100 +



SECTION 10

HEALTH PLAN COST MANAGEMENT REPORTS

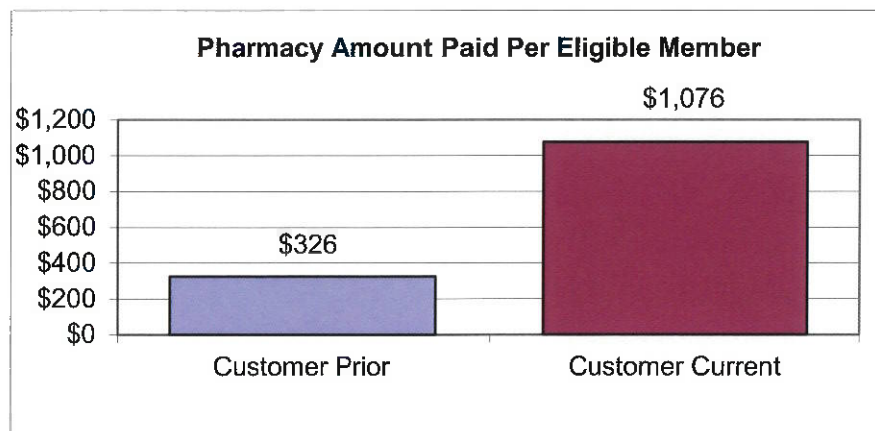
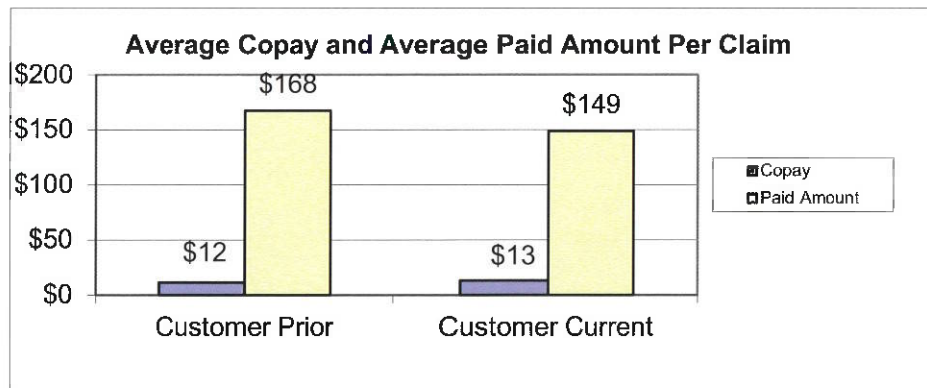
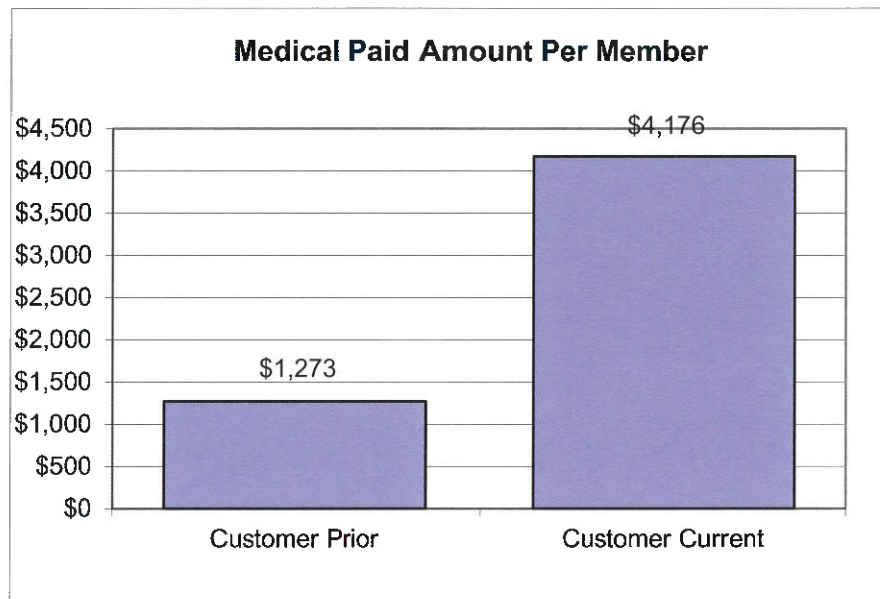
KEY STATISTICS

Demographics Summary for Medical	Customer Prior	Customer Current	% Change from Prior	Aetna BOB¹
Number of Employees	317	319	0.5%	N/A
Number of Members	629	636	1.2%	N/A
Ratio of Members to Employees	2.0	2.0	0.7%	2.0
Percent Male Members	53.6%	54.3%	0.7%	48.5%
Percent Female Members	46.4%	45.7%	-0.7%	51.5%
Average Age of Membership	29.9	30.0	0.3%	35.0
Total Medical and Pharmacy Paid Amount	\$1,005,501	\$3,342,123	232.4%	N/A
Total Pharmacy Paid Amount	\$204,904	\$684,719	234.2%	N/A
Pharmacy Paid Amount per Member ²	\$326	\$1,076	230.3%	N/A
Total Medical Paid Amount	\$800,597	\$2,657,404	231.9%	N/A
Medical Paid Amount per Employee	\$2,526	\$8,341	230.3%	N/A
Medical Paid Amount per Member	\$1,273	\$4,176	228.1%	N/A
Total Medical Capitation Payments	\$1,852	\$3,568	92.6%	N/A
Medical Capitation Paid per Member	\$3	\$6	90.4%	N/A
Total Medical Paid (Claims and Capitation)	\$802,450	\$2,660,971	231.6%	N/A
Medical Paid per Member (Claims and Capitation)	\$1,276	\$4,182	227.8%	N/A
Inpatient Paid Amount per Member	\$445	\$813	82.9%	N/A
Ambulatory Paid Amount per Member	\$828	\$3,363	306.1%	N/A
Admissions/1,000 Members	14	53	273.4%	53
Days of Care/1,000 Members	70	145	106.7%	247
Average Length of Stay	4.9	2.7	-44.7%	4.7
Total Surgeries/1,000 Members	141	651	359.8%	540
Inpatient Surgeries/1,000 Members	10	33	246.0%	38
Ambulatory Surgeries/1,000 Members	132	618	368.0%	502
Office Visits/1,000 Members	943	3,794	302.4%	3,432
ER Visits/1,000 Members	43	217	405.2%	241



SECTION 10
(Cont'd)

HEALTH PLAN COST MANAGEMENT REPORTS



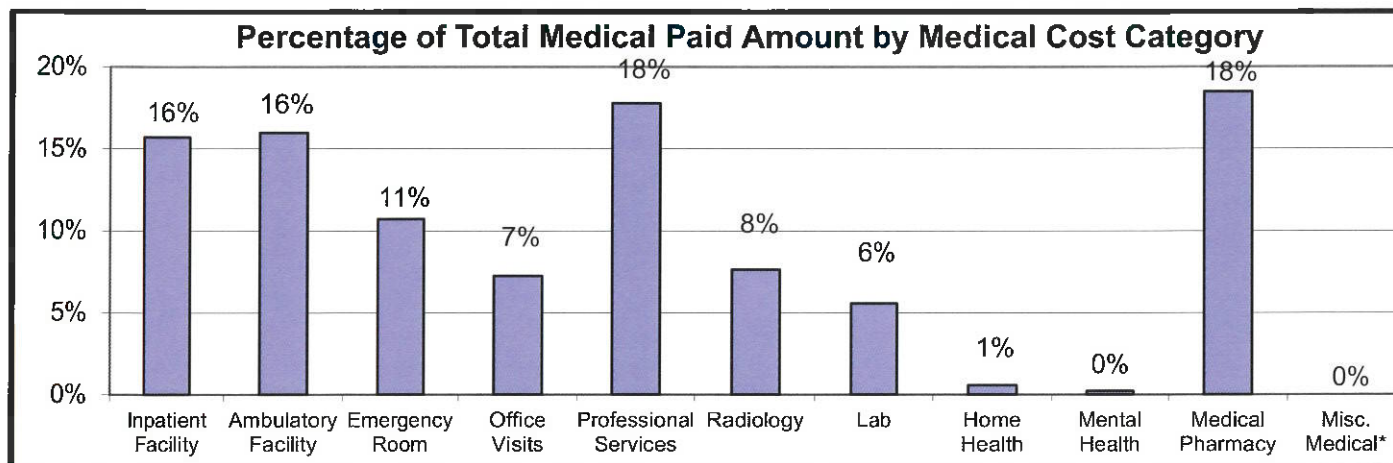


SECTION 10

HEALTH PLAN COST MANAGEMENT REPORTS

(Cont'd)

Trend Analysis by Medical Cost Category



Provider Network Experience - Medical

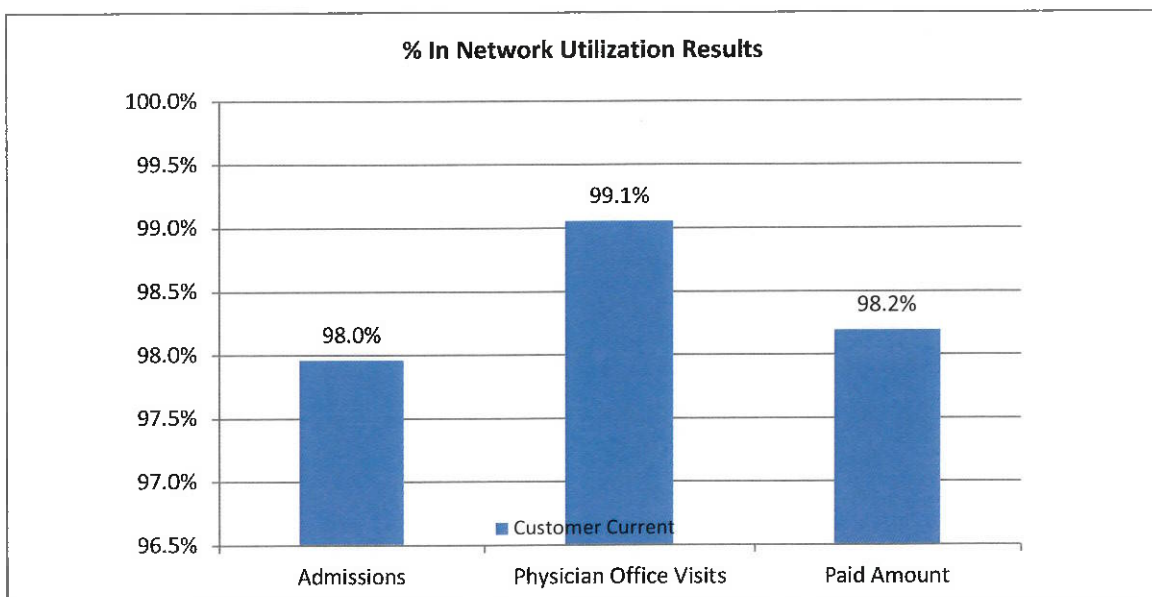
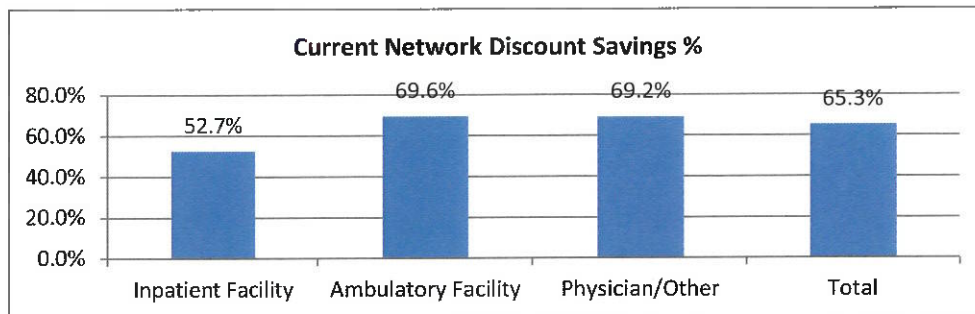
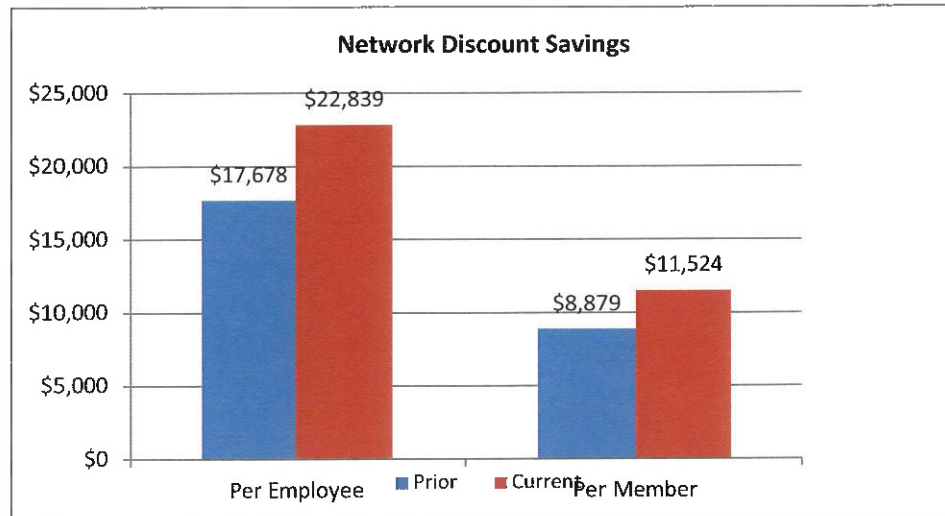
Provider Network Experience

In Network Experience	Prior	Current	% Change	Current Network Discount Savings
Billed Network Charges (before discount)	\$8,261,048	\$11,740,422	42.1%	
Network Discount Savings:				
Inpatient Facility	\$595,433	\$1,529,380	156.9%	52.7%
Ambulatory Facility	\$3,237,981	\$3,377,421	4.3%	69.6%
Physician/Other	\$1,845,742	\$2,759,533	49.5%	69.2%
Total	\$5,679,156	\$7,666,335	35.0%	65.3%
Network Discount Savings per Employee	\$17,678	\$22,839	29.2%	
Network Discount Savings per Member	\$8,879	\$11,524	29.8%	
Avg Discount Savings per Network Admission	\$17,513	\$31,862	81.9%	
Network Utilization Metrics				
% Admissions In Network	100.0%	98.0%	-2.0%	
% Physician Office Visits In Network	99.7%	99.1%	-0.7%	
% Claims Paid In Network	97.4%	98.2%	0.9%	

SECTION 10 HEALTH PLAN COST MANAGEMENT REPORTS

(Cont'd)

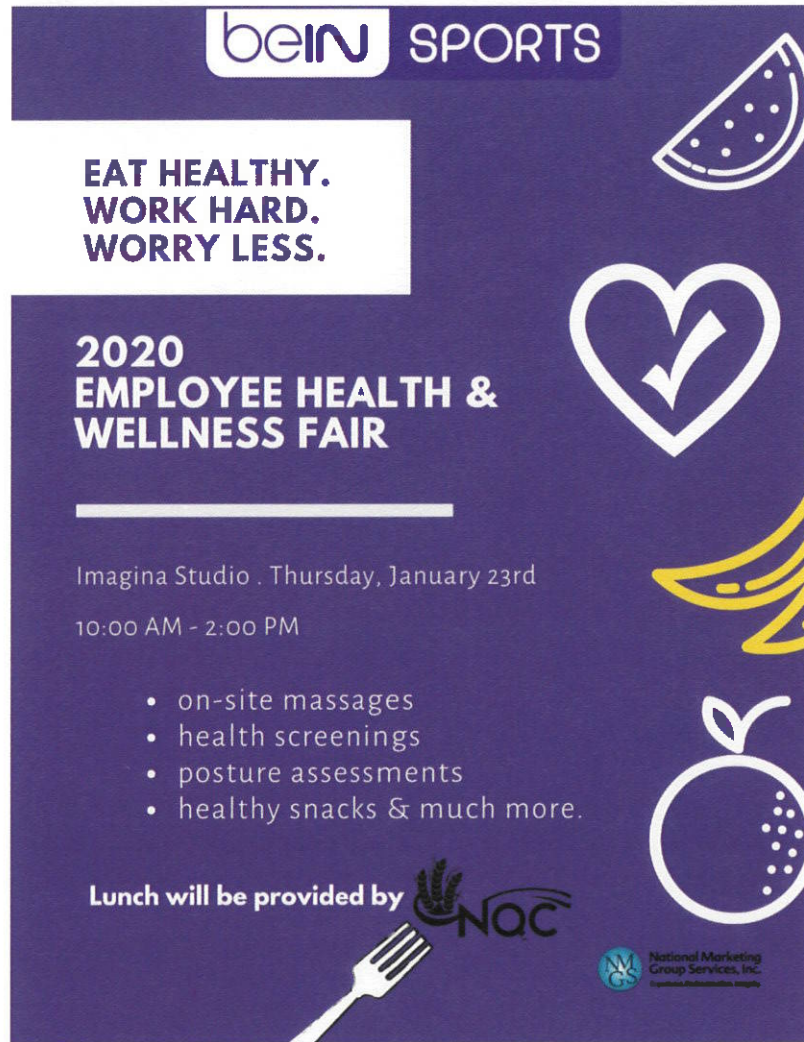
Provider Network Experience – Medical



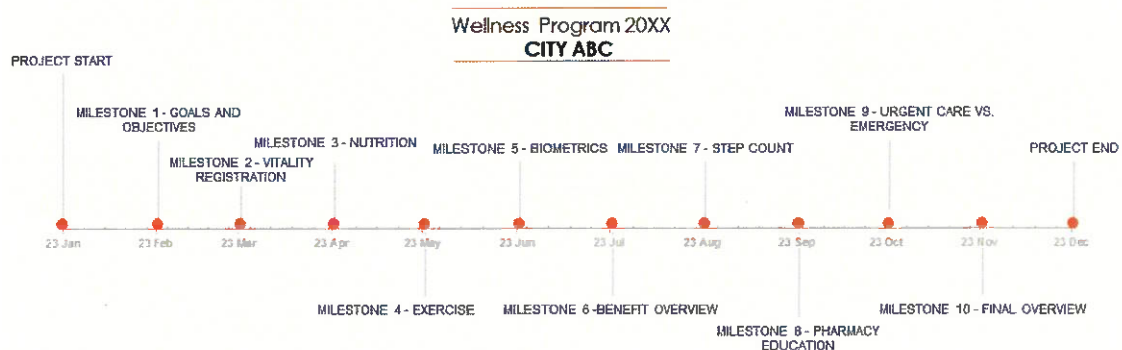
SECTION 10

HEALTH FAIR MARKETING

Wellness Material | Annual Health Fair Flier



Wellness Material | Wellness Program Timeline



SECTION 10

HEALTH FAIR MARKETING

(Cont'd)

Sample Wellness Material | Employee Health Fair Passport

3 What vitamin gives carrots and sweet potatoes their orange color?

- ☐ Vitamin A
- ☐ Vitamin O
- ☐ Vitamin D
- ☐ Folate

4 List at least **one** lifestyle change you intend to improve after attending this health fair.



- 2020 -

beIN SPORTS

EMPLOYEE HEALTH FAIR

Passport

THURSDAY, JANUARY 23, 2020
10:00 AM TO 2:00 PM

"The Groundwork of all happiness is good health."

EMPLOYEE NAME

SECTION 10

WELLNESS RESOURCES

(Cont'd)

Sample Wellness Material | Employee Wellness Information

Employee Health & Wellness Information

Blood Pressure



Normal blood pressure < 120/80.

High blood pressure (hypertension) can increase your risk for heart disease, stroke and kidney disease. You can play an active role in your health by making small modifications to your lifestyle:

- Eating a diet rich in fruits and vegetables, lean meats and low-fat dairy products
- Reducing your sodium intake
- Maintaining a healthy weight
- Reducing stress
- Including 30 minutes of aerobic exercise a day (ex. brisk walking)
- Quitting tobacco and limiting your alcohol

Know Your Health Numbers

Cholesterol



Normal ranges for total cholesterol: 100–199

The goal is to have your LDL level lower than 100, HDL greater than 40 if you are a male, or HDL greater than 50 if you are a female

Triglycerides ranging from 45–149.

SIMPLE WAYS TO HELP LOWER CHOLESTEROL:

- Eating more fruits, vegetables, fish,
- Using olive, canola and flax
- Including more foods high in soluble fiber (oat bran, nuts, beans, lentils, peas)

Blood Glucose



Normal Range (fasting blood glucose) is < 100 mg/dL

Helping reduce your risk for diabetes by eating foods low in saturated fats

- Including more foods high in soluble fiber (oats, peas, beans, carrots, apples)
- Adding at least 30 minutes of moderate exercise into your daily routine.

Healthy Weight



If most of your fat is around your waist rather than your hips, you're at a higher risk for heart disease and type 2 diabetes.

Waist Circumference:

Less than 35 inches for women

Less than 40 inches for men

'Health Numbers' Content Source: WebMD

The Content is not intended to be a substitute for professional medical advice, diagnosis, or treatment. Always seek the advice of your physician or other qualified health provider with any questions you may have regarding a medical condition. Never disregard professional medical advice or delay in seeking it because of material you have read in this book.

SECTION 10

WELLNESS RESOURCES

(Cont'd)

Sample Material | Benefits Fair

Ask Aetna Day!

January 29, 2020 9:00 AM until 3:30 PM
City Hall, Training Room (3rd Floor)

?

Aetna Members:

This is your opportunity to ask Aetna any medical or dental **insurance-related questions.**

?

Achieve your best health

Achieve your best health. Take your Personal Health Assessment today!

Learn about the rewards

Member and dependents can participate to earn up to **\$100-\$150** in rewards.

It's a win/win.

Based on your results, you'll get program recommendations and information that could help identify potential health risks.

SECTION 10

WELLNESS RESOURCES

(Cont'd)

Sample Wellness Material | Prescription Savings

HOW TO SAVE ON Prescription Drugs

Walgreens Prescription Club
\$5 / \$10 / \$15
30 Day Supply

\$4 Prescriptions
30 Day Supply

Free Medication Program
Free Antibiotics
Up to a 14 day supply

Online Pharmacy Discount Finder
Compare prices from local pharmacies,
print coupons ...and more.

GoodRx

Prescription Prices, Coupons & Local Pharmacy Information

www.goodrx.com

Take advantage of local pharmacy discount programs and save some money. Many retail stores offer discounted rates for Generic Prescription Drugs.

Search & Compare Prices
Find the lowest local prices for your prescriptions

Get Free Coupons
GoodRx coupons can save you up to 80% on your prescriptions at no cost to you

GoodRx is the #1 free medical app for iOS and Android

SECTION 10

(Cont'd)

HR Library | HR 360 Visuals

HR SUPPORT



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Experience. Professionalism. Integrity.

[Home](#) | [Admin Toolbar](#) | [Help](#) | [MyNmgs](#)

[Employee Benefits](#) | [Health Care Reform](#) | [Human Resources](#) | [Recruitment & Hiring](#) | [Discipline & Termination](#) | [State Laws](#) | [Forms & Policies](#) | [HR Apps & Tools](#) | [Resource Center](#) | [Safety & Wellness](#) | [HR Training](#)

[Form Search](#)

ACA Notices

COBRA Notices and Forms

Compensation and Reimbursement

HR Self Assessments

FMLA Notices

Form I-9

New Hire and Recruitment

Employee or HR Notices and Requests

Performance Reviews

Personnel Information

Sample Forms, Policies & Checklists

The Forms & Policies Section features over 500 sample HR forms, policies and checklists available for downloading, customizing and printing. The range of sample HR forms covers the most important and relevant aspects of managing human resources and the employer/employee relationship.

Search:

Find by Name:

ALL | A - C | D - F | G - L | M - O | P - R | S - Z







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[Home](#) | [Admin Toolbar](#) | [Help](#) | [MyNmgs](#)

[Employee Benefits](#) | [Health Care Reform](#) | [Human Resources](#) | [Recruitment & Hiring](#) | [Discipline & Termination](#) | [State Laws](#) | [Forms & Policies](#) | [HR Apps & Tools](#) | [Resource Center](#) | [Safety & Wellness](#) | [HR Training](#)

[Employee Benefits](#) | [Benefits Notices Calendar](#) | [Group Health Plans](#)

Benefits Notices Calendar

Group Health Plans

SPD-SMM-Plan Documents

Health Care Reform Notices

COBRA Notices

HIPAA Portability & Nondiscrimination Notices

Special Health Care Notices

Benefit Claims Notices

Notice Requirements for Group Health Plans

ERISA requires plan administrators to give plan participants in writing the most important facts they need to know about their group health plans, including plan rules, financial information, and documents on the operation and management of the plan. Some of these facts must be provided to participants regularly and automatically by the plan administrator. Others must be made available upon request, free-of-charge or for copying fees.

The major categories of notices required for group health plans included in this section are organized as follows:

- [Summary Plan Description \(SPD\)](#) • [Summary of Material Modifications \(SMM\)](#) • [Plan Documents](#)
- [Health Care Reform \(ACA\) Notices](#)
- [COBRA Notices](#)
- [HIPAA Portability and Nondiscrimination Notices](#)
- [Special Health Care Notices](#)
- [Benefit Claims Notices](#)
- [HIPAA Privacy and Security-Related Notices](#)
- [Medicare Part D Creditable Coverage Notices](#)
- [Family and Medical Leave Act \(FMLA\) Notices](#)

SECTION 10

HR SUPPORT

(Cont'd)

HR Library | HR 360 Visuals_(Cont'd.)



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[Health Care Reform](#)
[Human Resources](#)
[Recruitment & Hiring](#)
[Discipline & Termination](#)
[State Laws](#)
[Forms & Policies](#)
[HR Apps & Tools](#)
[Resource Center](#)
[Safety & Wellness](#)
[HR Training](#)

2021 ACA Checklist

ACA Penalties by Company Size

ACA Section 1557

Additional Medicare Tax for High Earners

Cadillac Tax

Cash for Premium Payments & Other Employer Payment Plans

Dependent Coverage to Age 26

Form W-2 Reporting Employer- Sponsored Health Coverage

Grandfathered Plans

Health Care Transparency

Health Insurance Exchanges (Marketplaces)

Individual Mandates

Information Reporting Under Sections 6055 and 6056 (Forms 1094 & 1095)

Medical Loss Ratio Rebates & Employer Responsibilities

Nondiscrimination and Health Care Reform

Pay or Play (Employer Shared Responsibility)

PCORI Fees for Self-Insured Plans

Premium Tax Credit for Individuals

Small Business Health Care Tax Credit

Hawaii Prepaid Health Care Act

Plans

Dependent Coverage to Age 26

Form W-2 Reporting Employer- Sponsored Health Coverage

[← Back](#)
[✉ Email](#)
[🖨 Print](#)

SECTION 10 BENEFITS ADMINISTRATION PORTAL

(Cont'd)

HR Employee Management | Employee Navigator

Reports

Ad Hoc Reports

Row-Based Report
Column-Based Report
Payroll Deductions Report
Voluntary and Group Life Report
HSA Report
Cafeteria Report
Retirement Report

Saved Reports

View/Manage Saved Reports
Favorites
No favorites selected --

General Reports

New Hire
Certifications
Education
Licenses
Emergency Contacts
Beneficiaries
Dependents
Termination

Enrollment Status Reports

New Hire Enrollment Reports
Can't Start
Not Started
In Process
Completed

COVID-19 Reports

CARES Act Insurance Costs
CARES Total Employee Count

Carrier Reports

Carrier Billing Summary
Carrier Billing Employees By Plan
Carrier Billing Employees With Rates and Groups
Self Bill Summary Report
Employee Enrollment Forms
Carrier Updates Detail Report
Bill Reconciliation
Primary Care Physicians
Coordination Of Benefits
Self Funded Enrollment Report

Benefit Reports

Benefit Confirmation Statements
Total Compensation Statements
COBRA Summary
COBRA Detail
Disability Tax Options
Surcharge Adjustments
Declined Enrollments
Withdrawn Enrollments
W-2 Summary

Change History Reports

Enrollment Changes
Payroll Deductions Changes
Benefit Exception Overrides

SECTION 10

BENEFITS ADMINISTRATION PORTAL

(Cont'd)

HR Employee Management | Employee Navigator (Cont'd.)

ACA Console

- Eligibility Dashboard
- Manage Employees
- Manage Hours
- Historical Import Tool
- New Hire Eligibility Report
- Stability Report
- ALE Calculator
- Affordability Calculator**
- Import Low Cost Plan Cost

ACA Setup

- Setup Guide
- Hours Threshold for Eligibility
- Measurement Periods
- ACA Classifications
- Assign ACA Plans
- Assign Safe Harbors

1094/1095 Reporting

- Part 1 Employer Information
- Audit and E-File
- Manage E-File Account
- ACA Code Override Report
- ACA Reporting Business Unit Override Report

Affordability Calculator [view article](#)

Low Cost Plan:
NHP BAIQ 2019 HMO 1
as of: 6/22/2021 10:47:48 AM

No employees with costs > 9.86% ⓘ

Annual Compliance Costs

Option 1
Increase company contributions for 101 eligible employees totaling: \$0.00

Option 2
Give pay raises to 0 out of compliance employees totaling: \$0.00

Average Costs

Employee	\$0.00
Company	\$369.18
Plan	\$369.18



SECTION 10

MISCELLANEOUS

(Cont'd)

Sample Open Enrollment Material | Open Enrollment Presentation

**2020/2021
EMPLOYEE BENEFITS
RESORT & SPA**

MEDICAL | DENTAL | VISION | GAP | LIFE | DISABILITY

Humana

HMO 16



DEDUCTIBLE	\$1,000/\$2,000
OUT-OF-POCKET MAX	\$4,000/\$8,000
CO-INSURANCE	20%
PCP/SPECIALIST/TELEHEALTH	\$25 / \$40 /\$25 copay
MAJOR DIAGNOSTICS	Lab: No charge Imaging: \$300 copay
URGENT CARE/EMERGENCY ROOM	\$75 / \$150 copay
INPATIENT /OUTPATIENT HOSPITAL	20% coinsurance AD* / 20% coinsurance AD*
RX	\$10/\$40/\$70/25% Specialty : 25/35% coinsurance (deductible does not apply.)
MAIL ORDER RX	\$25/\$100/\$175 (3 mo. supply)

No referrals required

SECTION 10

MISCELLANEOUS

(Cont'd)

Sample Open Enrollment Material | Open Enrollment Presentation

Humana

DENTAL PPO

	IN NETWORK	OUT-OF-NETWORK
DEDUCTIBLE	\$0 Ind/\$0 Fam	\$0 Ind/\$0 Fam
ANNUAL MAX	\$2,000 + extended annual maximum (30%)	
PREVENTATIVE	100%	100%
	No Waiting Period	
BASIC SERVICES	80%	80%
	No waiting period	
MAJOR SERVICES	50%	50%
	No waiting period	
ORTHO	50% CHILD ONLY THROUGH AGE 18 \$1,000 LIFETIME MAX	

SEARCHING FOR A HUMANA PROVIDER

SECTION 10

MISCELLANEOUS

(Cont'd)

Sample Open Enrollment Material | Open Enrollment Presentation

CLINICAL AND WELLNESS SERVICES



GO365 Platform - Save on medical insurance premiums when employees achieve Silver Status on Go365

- Up to \$300 in incentives (per adult member)
- Designated Wellness Consultant, Biometric Screenings and HealthyFood Program
- Employer Level Premium Incentives
- Discount achieved when 10 percent of employees reach Silver Status or higher
- The more employees participate, the higher your discount



MyHumana Mobile App

- Coverage and Benefits
- ID Cards
- Spending Accounts
- Claims
- Provider Finder



Dr. On Demand

- Connect face to face using your phone, tablet or computer, 24/7
- Skip the wait! Access to board certified doctors for non-emergency care within minutes
- Behavioral health services
- Depending on plan ranges from \$0-\$49

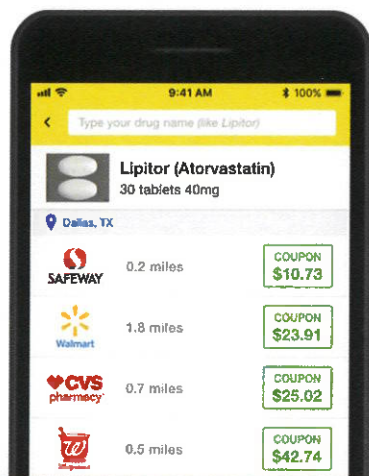


GOOD RX

GoodRx

GoodRx gathers current prices and discounts to help you find the lowest cost pharmacy for your prescriptions. The average GoodRx customer saves \$276 a year on their prescriptions.

Use the mobile app or go to www.goodrx.com



Search & Compare Prices

Find the lowest local prices for your prescriptions at more than 75,000 pharmacies.

Show To Your Pharmacist

It's easy, just show the GoodRx app to your pharmacist when picking up your prescription

GoodRx is 100% free.

No personal information required.



**City of Opa-locka
Office of the City Clerk**

3.2.1

**REQUEST FOR PROPOSAL
(RFP)**

**RFP NO. 21-0629100
Agent of Record for Employee
Benefit Programs**

PRESENTED BY:

**VistaNational Insurance Group, Inc.
1301 W. 22nd Street
Oak Brook, IL 60523
630-468-6507
Kahlil Hogan, Principal
June 25, 2021**

3.2.2

Table of Contents

3.2.2 Tab 1 - Table of Contents

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3.2.6 Tab 5 – Experience and Qualifications	11
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3.2.3

Letter of Transmittal

3.2.3 Tab 2 - Letter of Transmittal

3.2.3.1 Limit to one or two pages.

3.2.3.2 Briefly state the Proposers understanding of the work to be done and make a positive commitment to perform the work.

Dear City of Opa-Locka Evaluation Committee,

First and foremost, thank you for considering VistaNational as the employee benefits Agent of Record for City of Opa-Locka, Florida.

Founded in 1996, VistaNational has 35 full-time employees including our 5 Partners and President/CEO. The Executive Leadership Team, who are former BlueCross BlueShield (BCBS) executives, had the vision to develop VistaNational Insurance Group, Inc. and 25 years later we are reputed as an industry expert in the field of Employee Benefits. We increased our case count from 3 accounts in the beginning to over 250 accounts through June 2021 with a retention rate of over 95% annually. VistaNational is responsible for managing over \$200 Million in premium with the major insurance carriers. Collectively, our agency has over 200 years working in the insurance industry ranging from major insurance carriers; broker/consulting agencies, to third-party administrators; of which over 100 of those years were working for BCBS. VistaNational has designated Platinum Broker Status with United Healthcare (UHC), of which less than 1% of brokers nationally qualify, and Premier Producer with BCBS, resulting in more resources available on behalf of and for our clients. Additionally, we sit on their Advisory Boards as a means to help develop products and services to bring to the marketplace.

Delivering exceptional service and cost reduction strategies on behalf of our clients is our primary area of expertise. Our focus is the public entity market with employers ranging in size from 50 to 500 employees. Having worked for major insurance companies, we have insight into what good brokerage firms do well for their clients and what other agencies lack. VistaNational was born by incorporating the practices of those we admire by creating a business philosophy where our clients view us as an extension to their HR department. ***As an agency we are large enough to service, influential enough to be an invaluable negotiator, yet small enough to truly value our clients.*** We hold an A+ rating with the Better Business Bureau due to our strong presence in the industry as well as our ethics and values which we hold near and dear to everything we do as an agency and for our customers.

We understand the scope of services required by City of Opa-Locka and are fully committed to exceed the City's expectations of their broker. Throughout this RFP, you will come to see why VistaNational is best situated to act as AOR for cities and municipalities and why our clients renew year after year with VistaNational.

3.2.3.3 Give the names of the persons who will be authorized to make representations for the Proposer, their titles, addresses and telephone numbers.

Rich Mathews	Principal	mathewsr@vistanational.com	630-468-6504
Kahlil Hogan	Principal	hogank@vistanational.com	630-468-6507
Rob Schaefer	Producer	schaefer@vistanational.com	630-468-6521
Bridgette Stewart	Account Exec.	stewartb@vistanational.com	630-468-6528
Patricia (Pat) Allen	Account Mgr.	allenp@vistanational.com	630-468-6544
Katie Mulcahy	Concierge	mulcahyk@vistanational.com	630-468-6509
Jimi Grauberger	Wellness	graubergerj@vistanational.com	630-468-6548
Meghan Bowman	Compliance	bowmanm@vistanational.com	630-468-6529

Address: 1301 W 22nd. Street, Suite 600, Oak Brook, IL 60523

3.2.3.4 Provide an official signature of a Corporate Officer certifying the contents of the Proposer's responses to the City's Request for Proposal.

Signed By:



Kahlil Hogan
Principal / Director of Operations
VistaNational Insurance Group, Inc.

3.2.4

General Information

3.2.4 Tab 3 - General Information

3.2.4.1 Name of Business.

VistaNational Insurance Group, Inc.

3.2.4.2 Mailing Address and Phone Number.

1301 W. 22nd Street, Suite 600, Oak Brook, Illinois 60523

3.2.4.3 Names and contact information of persons to be contacted for information or services if different from name of person in charge.

Rich Mathews	Principal	mathewsr@vistanational.com	630-468-6504
Kahlil Hogan	Principal	hogank@vistanational.com	630-468-6507
Rob Schaefer	Producer	schaefer@vistanational.com	630-468-6521
Bridgette Stewart	Account Exec.	stewartb@vistanational.com	630-468-6528
Patricia (Pat) Allen	Account Mgr.	allenp@vistanational.com	630-468-6544
Katie Mulcahy	Concierge	mulcahyk@vistanational.com	630-468-6509
Jimi Grauberger	Wellness	graubergerj@vistanational.com	630-468-6548
Meghan Bowman	Compliance	bowmanm@vistanational.com	630-468-6529

3.2.4.4 Normal business hours.

Monday – Friday, 9am-5pm CST

3.2.4.5 State if business is local, national, or international and indicate the business legal status (corporation, partnership, etc.).

VistaNational's scope of service is national.

VistaNational is an S Corporation

3.2.4.6 Give the date business was organized and/or incorporated, and where.

VistaNational was incorporated in November of 1996 in the city of Park Ridge, IL.

3.2.4.7 Give the location of the office from which the work is to be done and the number of professional staff employees at that office.

VistaNational's corporate headquarters in in Oak Brook, Illinois where a total of 35 staff members work.

3.2.4.8 Indicate whether the business is a parent or subsidiary in a group of firms/agencies. If it is, please state the name of the parent company.

VistaNational is not a parent or subsidiary.

3.2.4.9 State if the business is licensed, permitted and/or certified to do business in the State of Florida and attach copies of all such licenses issued to the business entity.

VistaNational is licensed and is certified to do business in the State of Florida on a corporate and individual level. Please see the following two pages for a copy of VistaNational's corporate license and the individual license for Greg Bonner, Senior Producer, at VistaNational Insurance Group, Inc.

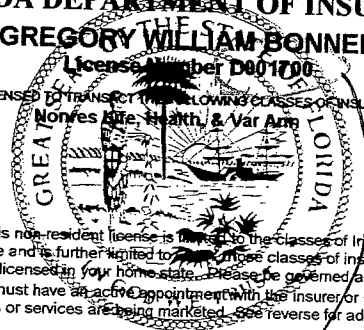
FLORIDA DEPARTMENT OF INSURANCE

GREGORY WILLIAM BONNER

License Number D001700

IS LICENSED TO TRANSACT THE FOLLOWING CLASSES OF INSURANCE:

Non-Fes Life, Health, & Var Ann



"NOTICE" - This non-resident license is limited to the classes of insurance reflected above and is further limited to those classes of insurance for which you are licensed in your home state. Please be governed accordingly. This licensee must have an active appointment with the insurer or employer for which products or services are being marketed. See reverse for additional requirements.

D001700

FLORIDA DEPARTMENT of FINANCIAL SERVICES

VISTANATIONAL INSURANCE GROUP, INC.

1301 W 22ND STREET
SUITE 600
OAK BROOK IL 60523

Agency License Number L062160

Location Number: 189491

Issued On 09/25/2014

Pursuant To Section 626.0428, Florida Statutes, This Agency Location Shall Be In The Active Full-Time Charge Of A Licensed And Appointed Agent Holding The Required Agent Licenses To Transact The Lines Of Insurance Being Handled At This Location.

Pursuant To Subsection 626.172(4), Florida Statutes, Each Agency Location Must Display The License Prominently In A Manner That Makes It Clearly Visible To Any Customer Or Potential Customer Who Enters The Agency Location.



Jimmy Patronis
Chief Financial Officer
State of Florida

3.2.5

Project Approach

3.2.5 Tab 4 – Project Approach

Describe in detail your proposal to fulfill the requirements of the scope of services listed in section 2.2 of this RFP.

VistaNational is a “Benefits-Only” boutique firm and we provide a comprehensive service platform. Vista’s scope of services would include, but is not limited to, the following:

Data Analysis:

- Complete review of the insurance renewals (looking for past underwriting errors and/or inflated costs)
- Complete review of current utilization of high-cost services (i.e. Emergency Room, Therapy benefits, Prescription drugs)
- Financial reviews of claims data
- Early renewal projection 6 months out from renewal date

Annual Renewal Process:

- Request updated census information 180 days in advance of renewal anniversary dates
- Send Request of Proposals (RFPs) for all product lines out to the markets
- Request renewals from carriers for all product lines 90 days in advance of renewal anniversary dates (earlier if requested)
- Upon receipt continually work with the incumbent carriers to negotiate cost projections through in-depth analysis of underwriting exhibits.
- Negotiate with markets for competitive quotes and leverage markets with incumbent carriers’ renewal projections
- Prepare presentation for client review

Compliance:

- Updates regarding legislative changes in the industry
- Seminars as needed hosted by our Benefits Attorney
- Access to templates (i.e. benefit handbooks, etc.) through online HR Portal (ThinkHR)

Services:

- Dedicated Account Service team
- 800 Customer Service Number
- Dedicated Claim Resolution Team (for plan administrator as well as participants)
- Enrollment Services
- ERISA Attorney on Retainer
- Benchmarking
- Comprehensive Annual Marketing
- Resolution of billing, claims and administrative recovery issues
- Contribution Strategies
- Claim Data Mining
- Plan Cost Analysis
- COBRA Administration

- Dependent Audits
- Customized Employee Brochures
- On-line Web-based Employee Benefits portal
- Voluntary Annual On-Site Wellness Screenings (consisting of Health Risk Assessment, Blood Draw, and Blood Pressure screening)
- On-line Enrollment Options

Strategic Thinking:

- Benchmarking/Forecasting/Modeling tools (i.e. contribution strategies, plan designs like Consumer Driven Health Plans)
- Analysis and comparison of Industry-specific Cost and Benefits
- Through 5-year planning, work towards maximizing Wellness initiatives and return on investment by incorporating claim feeds from carriers to our wellness vendors in an effort to demonstrate correlation between improved health and lower claim cost.

Additionally, VistaNational provides these additional services to our clients.

Open Enrollment Announcements – We provide a “roll-out” program ahead of the open enrollment meetings. The purpose of the materials is to announce open enrollment, its importance to the employees, and to announce the upcoming meetings.

Open Enrollment Meetings - Our enrollment team is flexible and handles the enrollment process specifically based on the City’s needs. The strategies our clients utilize include VistaNational leading group meetings, online enrollment, webinars, etc. We encourage a combination of group meetings along with online enrollment. The group meetings would be used as a means to educate the employees about their benefit options and to allow for a Q & A session. We would aim to begin the enrollment process at least 45 to 60 days in advance of the anniversary date, with a window of one to two weeks for completion.

Customized Enrollment Booklets – Employees appreciate having an all-encompassing benefit booklet that simplifies the benefit’s highlights and can be referenced easily by dependents enrolled in the plan.

Dedicated and Accessible Service Team – A portion of the open enrollment meetings and a page on the benefits booklet include contact information for the dedicated VistaNational team. We educate the employees on the opportunity for them to contact VistaNational directly for regular service needs, escalated issues, and for any billing or claims questions.

Custom Online Portal - VistaNational provides Employee Navigator software, which is an all-in-one Benefits, HR and Compliance system. Specifically, it is a system that handles Benefit Administration, Payroll Integration, New Hire Onboarding, ACA & COBRA, Asset Tracking, PTO and HR Management.

Claims/Billing Resolution Department – This Concierge Service department helps employees with billing or claims questions. By analyzing the employee bill as compared to the plan certificate, the department will confirm if errors were made and then will work on the employee’s

behalf to have those errors corrected. VistaNational also offers a mobile app dedicated for helping employees relay their information and communicate directly with this department.

Wellness Coordinator – Jimi manages our Wellness Department and will help build a wellness program around currently available and free wellness programs or through wellness vendors at a discounted rate.

ThinkHR – Think HR is an HR Web platform and a Live resource available to our clients.

LIVE – Certified, senior advisors to provide trustworthy guidance to prevent and resolve challenging people situations and compliance issues.

LIVING HANDBOOK - a federal and state level compliant handbook builder that allows the incorporation of unique company policies and delivers policy update alerts as regulations change.

LEARN - deliver training courses on a variety of topics your employees and organization need to adhere to compliance mandates, improve safety, foster professional development, and improve engagement.

COMPLY - an extensive resource library including insightful guides, comprehensive checklists, and other invaluable resources to navigate HR, compliance, safety, and People Risk Management issues.

INSIGHT - a steady stream of need-to-know information such as compliance news, expert analysis, legislative updates, and best practices through Law Alerts, monthly newsletters, and HR accredited webinars.

BENEFITS DOCUMENT CREATOR - a simplified solution for the creation and ongoing maintenance of ERISA compliant Wrap, SPD, and POP documents, including policy update alerts and digital signature functionality.

Legal Counsel – Legal counsel is available through several ERISA Attorneys with whom VistaNational keep on retainer on behalf of our clients.

3.2.6

Experience and Qualifications

3.2.6 Tab 5 – Experience and Qualifications

3.2.6.1 Specify the number of years the Proposer has been in business.

Founded in 1996, VistaNational has been in business for 25 years.

3.2.6.2 Identify the Proposer's qualifications to perform the services identified in this RFP as listed in section 2-2 of the Scope of Services.

Founded in 1996, VistaNational has 35 full-time employees including our 5 Partners and President/CEO. The Executive Leadership Team, who are former BlueCross BlueShield (BCBS) executives, had the vision to develop VistaNational Insurance Group, Inc. and 25 years later we are reputed as an industry expert in the field of Employee Benefits. We increased our case count from 3 accounts in the beginning to over 250 accounts through June 2021 with a retention rate of over 95% annually. VistaNational is responsible for managing over \$200 Million in premium with the major insurance carriers. Collectively, our agency has over 200 years working in the insurance industry ranging from major insurance carriers; broker/consulting agencies, to third-party administrators; of which over 100 of those years were working for BCBS. VistaNational has designated Platinum Broker Status with United Healthcare (UHC), of which less than 1% of brokers nationally qualify, and Premier Producer with BCBS, resulting in more resources available on behalf of and for our clients. Additionally, we sit on their Advisory Boards as a means to help develop products and services to bring to the marketplace. We hold an A+ rating with the Better Business Bureau due to our strong presence in the industry as well as our ethics and values which we hold near and dear to everything we do as an agency and for our customers.

Each VistaNational team member has a vital role in making sure all areas of your employee benefit programs are operating efficiently. The depth of our team is designed to provide a comprehensive strategy built around meeting the financial needs of the City and then exceeding the service needs for your HR and the employees. Our internal support team is available in the office daily. Our Claims Specialist is vital when billing questions arise and employees find themselves in need of an advocate who will assist in identifying and resolving issues so that your employees can focus on their business at hand. VistaNational staff are required to be licensed for Life, Accident, and Health insurance. To maintain that license, VistaNational staff are required to participate in 24 hours of continuing education classes and a three-hour ethics course every two years. The insurance carriers conduct regular educational meetings on-site to educate VistaNational employees on upcoming service enhancements available to VistaNational clients. This holistic approach is why we have been recognized as one of the leading mid-size agencies and are held in high regard throughout the industry.

Rich Mathews (Senior Principal)

Rich is a Senior Broker/Consultant and a Senior Principal of the firm. Prior to VistaNational, Rich was employed for 10 years in the Marketing and Group Sales division of Blue Cross and Blue Shield. His responsibilities as a senior marketing executive were to build, price and sell BCBS medical programs throughout the Chicago area. Rich has 25 years of sales and consulting on public sector and public education accounts. Rich will be responsible for overseeing your account at a high level, negotiating with the markets, and providing feedback on market conditions and industry changes

to keep the team abreast of how to best service the City.

Kahlil Hogan (Principal/Director of Operations)

Kahlil Hogan is the Director of Operations and a Principal of the firm. He is responsible for overseeing the operations of the organization, which includes managing the various departments. In addition, he maintains a book of public entity clients where he maintains the high quality of Vista's benefits practice, including strategic benefits planning, financial analysis, renewal negotiations, and carrier performance. Kahlil worked for Blue Cross Blue Shield for seven years as a Senior Account Executive and Underwriter before joining VistaNational in 2004. Kahlil will be responsible for overseeing the financial analysis that is performed by our in-house Financial Analyst, as well as developing the underwriting models for your account and working in tandem with Rich Mathews when negotiating with the carriers. He will also ensure that the account team is meeting all of the objectives set forth to deliver on our promise in providing excellent service.

Rob Schaefer (Broker/Consultant)

Rob Schaefer is a Broker/Consultant with VistaNational. Rob joined VistaNational in 2012 after identifying an opportunity to join a leading brokerage firm that was positioned to help businesses reduce costs and enhance employee benefits packages. Since joining VistaNational, Rob has worked effectively with local small, medium, and large public and private businesses to identify and implement programs to reduce costs.

Bridgette Stewart (Senior Account Executive)

Bridgette is an Account Executive with 20 years of experience in the insurance industry. Prior to joining the VistaNational team, Bridgette worked for a major insurance carrier and employee benefits consulting firm. She facilitates renewal strategy meetings, conducts onsite open enrollment meetings, and resolves billing, claims, eligibility and enrollment issues for employer group clients. Bridgette has a passion for meeting client needs and builds strong relationships to help clients meet their goals.

Pat Allen (Account Manager)

Pat is an Account Manager with VistaNational. Pat joined the Vista team in 2016 with 30 years' experience working in Employee Benefits. Pat's focus is to respond to the needs of employers and individuals with information and expertise concerning benefit questions and to provide solutions to administrative issues.

Katie Mulcahy (Senior Claims Specialist)

Katie is a Claims Specialist with VistaNational. She helps to navigate the complexity of medical billing and carrier claims processing. She facilitates the resolution of carrier issues (eligibility, claims, and billing), helping to ensure accurate benefits for our members. Katie came to VistaNational in 2016 with a background in student healthcare, marketing and business development.

Jimi Grauberger (Wellness Coordinator)

Jimi is the Wellness Coordinator for VistaNational. She graduated with a degree in Health Sciences from the University of Missouri and joined the Vista Team in 2020. Jimi's responsibilities include assisting clients in developing and implementing Wellness and Preventive Care Programs to create the greatest workforce health impact and return on investment.

Meghan Bowman (Senior Marketing Specialist / Compliance Officer)

Meghan is a Marketing Specialist/Compliance Officer with VistaNational. She is a graduate from Illinois State University and expanded her education in Business Administration when she joined the Vista Team in 2015. Meghan's responsibilities include marketing for our existing client benefit packages, entering the competitive data for analysis, and monitoring regulatory requirements to ensure compliance.

Of VistaNational's approximate \$200,000,000 in annual premium with the medical carriers, approximately 40% of those annual premiums are with municipalities.

VistaNational's track record for our public clients include renewal increases below trend, year-over-year. This is a result of our background having worked for major insurance carriers.

Kahlil Hogan, Partner at VistaNational Insurance Group, an African American, manages the growth of VistaNational's service team and he is continuing to diversify the staff.

3.2.7 Schedule

3.2.7 Tab 6 – Schedule

3.2.7.1 Include a timetable that identifies the amount of time required to complete each component of the Program.

The below timetable is presented showing the 180 days leading up to the January 1, 2022 renewal. Each section outlines the various components of the renewal process, which party is responsible for the component, and the date when the component will be complete. Should VistaNational earn the privilege of working as Agent of Record for the City, we will review and add-to or update the timeline to meet the needs of the City.

CITY OF OPA-LOCKA
INSURANCE RENEWAL STRATEGY AND TIMELINE
JULY 1, 2021 THROUGH DECEMBER 31, 2021
Plan Anniversary Date - JANUARY 1, 2022

		July	August	September	October	November	December
ACTION	Responsibility						
DAYS		180	150	120	90	60	30
Renewal Strategy							
Outline Timeline for Renewal / Discuss plan benefits	VN/Opa-Locka	→					
Census Preparation and completion	Opa-Locka	→					
Prepare Marketing	VN	→					
Pre-Renewal Presentation							
Distribute Marketing	VN		→				
Marketing Due	VN		→				
Discuss Plan Design, Alternate Options & Markets	VN/Opa-Locka		→				
Renewal							
Renewal Due from Vendors	VN		→				
Renewal Negotiation	VN			→			
Present Renewal & Marketing	VN			→			
Finalize Renewal & Implementation Process	VN/Opa-Locka			→			
Finalize Enrollment Meeting Dates/Times, Contact Vendors	VN/Opa-Locka			→			
Confirm Vendor Contacts for Meetings	VN				→		
Review Enrollment Communications & Send to Opa-Locka for Approval	VN				→		
Opa-Locka Approval	Opa-Locka				→		
Implementation Process							
Open Enrollment Period	VN/Opa-Locka				→		
Renewal Contracts							
Review Renewal Contracts for Accuracy	VN					→	
Send Reviewed Contracts to Opa-Locka for Approval	VN					→	
Sign Renewal Documentation & Return to VistaNational	Opa-Locka					→	
Forward Signed Renewal Documentation to Vendors	VN					→	
Verify Renewal Processed With Vendors	VN					→	
Ensure Vendor Billings Coincide With Renewal Documentation	VN					→	

3.2.7.2 Indicate the earliest available start date for your project team.

We are available to begin servicing the City and its employees effective immediately.

3.2.7.3 Indicate the project completion date based on the date provided in 3.2.7.1.

Our timeline shows a completion date of 12/15/2021. We hold ourselves accountable to have the open enrollment process wrapped up entirely for the January 1, 2022 renewal two weeks before the renewal date. We aim for this date considering the holidays at the end of December.

3.2.8

Pricing of Services

3.2.8 Tab 7 – Pricing of Services

3.2.8.1 Fee basis should be an all-inclusive, base fee.

We will accept the current commissions already built into the current programs. Or, should the City request a base fee, we would remove all commissions from the carriers (net of commissions) and we would recommend an annual fee in the amount of \$60,000 paid directly to VistaNational either up-front or monthly. Included at no cost above the earned commissions, our services are listed in Tab 4 – Project Approach.

3.2.9

References

3.2.9 Tab 8 – References

3.2.9.1 List a minimum of three (3) references in Florida for which the proposer has provided Agent of Record services. Include the name of the organization, brief description of the project, name of contact person telephone number and email address.

Thunderbird LLC

Thunderbird LLC (400 employees)

Scott Radwan (Director of Human Resources)

Phone: (219) 743-4391 Email: Scott.Radwan@thunderbirdllc.com

2050 Sunnydale Boulevard, Clearwater, FL 33765

Falk Waas

Falk, Waas, Hernandez, Solomon, Mendlestein & Davis, P. A. (40 employees)

Shauni Flores (Firm Administrator)

Phone: (305) 447-1912 Email: SFlores@falkwaas.com

135 San Lorenzo Avenue, Suite 500, Coral Gables, Florida 33146

National University of Health Sciences

National University of Health Sciences (130 employees)

Andrew Wozniak (Director of Human Resources)

Phone: (630) 889-6878 Email: awozniak@nuhs.edu

6630 78th Ave N, Pinellas Park, Florida 33781

3.2.10

Additional Forms

3.2.10 Tab 9 – Additional Forms

Proposers must compete and submit as part of its Proposal all of the following forms and/or documents

- ☐ Proposer Qualifications
- ☐ Certification regarding debarment and suspension
- ☐ Drug Free workplace certification

Please see the following pages for the requested documents.



RFP NO. 21-0629100

AGENT OF RECORD FOR EMPLOYEE BENEFIT PROGRAMS

PROPOSER QUALIFICATIONS

The Proposer, as a result of this proposal, MUST hold a County and/or Municipal Contractor's Occupational License in the area of their fixed business location. The following information MUST be completed and submitted with the proposal to be considered:

1. Legal Name and Address:

Name: VistaNational Insurance Group, Inc.

Address: 1301 W 22nd Street, Suite 600

City, State, Zip: Oak Brook, IL 60523 Phone/Fax: 630-468-6500

2. Check One: Corporation (☒) Partnership () Individual ()

3. If Corporation, state:
Date of Incorporation: Nov., 1996 State in which Incorporated: IL

4. If an out-of-state Corporation, currently authorized to do business in Florida, give date of such authorization: Sep., 2014

5. Name and Title of Principal Officers

Date Elected:

David Schwimmer, Founder, President and CEO, 1996

Bill Novak, Managing Director, 1997

Rich Mathews, Senior Principal, 1997

Tom Mathew, Principal/CFO, 2012

Kahlil Hogan, Principal/Director of Operations, 2010

Brian Walsh, Managing Director, 1998

6. The length of time in business: 25 years

7. The length of time (continuous) in business as a service organization in Florida:
7 years

8. Provide a list of at least three commercial or government references that the bidder has supplied service/commodities meeting the requirements of the City of Opa-locka specification, during the last twenty-four months. Included in RFP

9. A copy of County and/or Municipal Occupational License(s) Included in RFP

Note: Information requested herein and submitted by the proposers will be analyzed by the City of Opa-locka and will be a factor considered in awarding any resulting contract. The purpose is to insure that the Contractors, in the sole opinion of the City of Opa-locka, can sufficiently and efficiently perform all the required services in a timely and satisfactory manner as will be required by the subject contract. If there are any terms and/or conditions that are in conflict, the most stringent requirement shall apply.



RFP NO: 21-0629100
PRICE PROPOSAL FORM

AGENT OF RECORD FOR EMPLOYEE BENEFIT PROGRAMS

PROPONENT understands and agrees that the Contract Price is the lump sum to furnish and install all of the Work complete in place. Vendor's price will not be adjusted unless the CITY changes the scope of the Project after the Contract Date.

As such, the Vendor shall furnish all labor, materials, equipment, tools, superintendence and services necessary to provide a complete, in place Project for the Proposed Price of:

LUMP SUM PRICE: \$ 60,000 if net-of-commissions
or
standard carrier commission schedule

SUBMITTED

THIS

Thurs

DAY OF

June,

2021.

BID SUBMITTED BY:

VistaNational Insurance Group, Inc.

630-468-6500

Company

Telephone Number

Kahlil Hogan

630-468-6600

Name of Person Authorized to Submit
Bid

Fax Number

Kahlil Hogan

hogank@vistanational.com

Signature

Email Address

Principal / Director of Operations

Title



CITY OF OPA-LOCKA

CERTIFICATION REGARDING DEBARMENT, SUSPENSION PROPOSED DEBARMENT AND OTHER MATTERS OF RESPONSIBILITY

1. The Proposer certifies, to the best of its knowledge and belief, that the Proposer and/or any of its Principals:

A. Are not presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency.

B. Have not, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property; and

C. Are not presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph 1-B of this provision.

2. The Proposer has not, within a three-year period preceding this offer, had one or more contracts terminated for default by any City, State or Federal agency.

A. "Principals," for the purposes of this certification, means officers; directors; owners; partners; and, persons having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions). This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution Under Section 1001, Title 18, United States Code.

B. The Proposer shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Proposer learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

C. A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the Proposer's responsibility. Failure of the Proposer to furnish a certification or provide such additional information as requested by the Contracting Officer may render the Proposer non-responsive.

D. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of a Proposer is not required to exceed

that which is normally possessed by a prudent person in the ordinary course of business dealings.

E. The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Proposer knowingly rendered an erroneous certification, in addition to other remedies available to the Government, the Contracting Officer may terminate the contract resulting from this solicitation for default.

AS THE PERSON AUTHORIZED TO SIGN THE STATEMENT, I CERTIFY THAT THIS FIRM COMPLIES FULLY WITH THE ABOVE REQUIREMENTS.

Signature Kahlil Hogan

Printed Name Kahlil Hogan



**CITY OF OPA-LOCKA
RFP NO. 21-0629100**

DRUG-FREE WORKPLACE CERTIFICATION FORM

Whenever two (2) or more bids/proposals, which are equal with respect to price, quality, and service, are received by the CITY OF OPA-LOCKA for the procurement of commodities or contractual services, a bid/proposal received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of controlled substances is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in number (1).
4. In the statement specified in number (1), notify the employees that as a condition for working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction on or plea of guilty or no contest to any violation of Chapter 893, Florida Statutes or of any controlled substance law of the United States or any singular state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of Section 287.087, Florida Statutes.

This Certification is submitted by Kahlil Hogan the
Principal/Director of Operations of VistaNational Insurance Group, Inc.
(Title/Position) (Company)

who does hereby certify that said Company has implemented a drug-free workplace program, which meets the requirements of Section 287.087, Florida Statutes, which are identified in numbers (1) through (6) above.

6/24/2021
Date

Kahlil Hogan
Signature



**CITY OF OPA-LOCKA
NON-COLLUSION AFFIDAVIT**

STATE OF FLORIDA - COUNTY OF MIAMI DADE

Kahlil Hogan being first duly sworn, deposes and says that:

- (1) He/She/They is/are the Partner
(Owner, Partner, Officer, Representative or Agent) of
VistaNational Insurance Group, Inc. the PROPONENT that has submitted the attached proposal;
- (2) He/She/They is/are fully informed respecting the preparation and contents of the attached Proposal and of all pertinent circumstances respecting such Proposal;
- (3) Such Proposal is genuine and is not a collusive or sham Proposal;
- (4) Neither the said PROPONENT nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, have in any way colluded, conspired, connived or agreed, directly or indirectly, with any other PROPONENT, firm, or person to submit a collusive or sham Proposal in connection with the Work for which the attached Proposal has been submitted; or to refrain from Proposing in connection with such Work; or have in any manner, directly or indirectly, sought by agreement or collusion, or communication, or conference with any PROPONENT, firm, or person to fix any overhead, profit, or cost elements of the Proposal or of any other PROPONENT, or to fix any overhead, profit, or cost elements of the Proposed Price or the Proposed Price of any other PROPONENT, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the proposed Work;
- (5) The price or prices quoted in the attached Proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the PROPONENT or any other of its agents, representatives, owners, employees or parties of interest, including this affiant.

Signed, sealed and delivered in the presence of:

Robert Schaefer
Witness

Olivia Duguay
Witness

By: Kahlil Hogan
Signature

Kahlil Hogan, Principal / Director of Operations
Print Name and Title



NON-DISCRIMINATION AFFIDAVIT

I, the undersigned, hereby duly sworn, depose and say that the organization, business or entity represented herein shall not discriminate against any person in its operations, activities or delivery of services under any agreement it enters into with the City of Opa-locka. The same shall affirmatively comply with all applicable provisions of federal, state and local equal employment laws and shall not engage in or commit any discriminatory practice against any person based on race, age, religion, color, gender, sexual orientation, national origin, marital status, physical or mental disability, political affiliation or any other factor which cannot be lawfully used as a basis for service delivery.

By: Kahlil Hogan

Title: Principal / Director of Operations

Sworn and subscribed before this

Thursday of June 24, 2021

tbd

Notary Public, State of Florida

tbd

(Printed Name)

My commission expires: tbd



E-VERIFY

Effective January 1, 2021, public and private employers, contractors and subcontractors will be required to register with, and use of the E-verify system in order to verify the work authorization status of all newly hired employees. Vendor/Consultant/Contractor acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of:

- a) All persons employed by Vendor/Consultant/Contractor to perform employment duties within Florida during the term of the contract; and
- b) All persons (including sub-vendors/sub-consultants/sub-contractors) assigned by Vendor /Consultant/ Contractor to perform work pursuant to the contract with the Department. The Vendor /Consultant/ Contractor acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the contract is a condition of the contract with the City; and

By entering into a Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes but is not limited to utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The contractor shall maintain a copy of such affidavit for the duration of the contract. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. If t contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination. The Contractor acknowledges it is liable to the City for any additional costs as a result of termination of the contract due to Contractor's failure to comply with the provisions herein.



E-VERIFY FORM

Definitions:

"Contractor" means a person or entity that has entered or is attempting to enter into a contract with a public employer to provide labor, supplies, or services to such employer in exchange for salary, wages, or other remuneration.

"Subcontractor" means a person or entity that provides labor, supplies, or services to or for a contractor or another subcontractor in exchange for salary, wages, or other remuneration.

Effective January 1, 2021, public and private employers, contractors and subcontractors will begin required registration with, and use of the E-verify system in order to verify the work authorization status of all newly hired employees. Vendor/Consultant/Contractor acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of:

- a) All persons employed by Vendor/Consultant/Contractor to perform employment duties within Florida during the term of the contract; and
- b) All persons (including sub-vendors/subconsultants/subcontractors) assigned by Vendor/Consultant/Contractor to perform work pursuant to the contract with the Department. The Vendor/Consultant/Contractor acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the contract is a condition of the contract with the City of Opa-locka; and

Should vendor become successful Contractor awarded for the above-named project, by entering into this Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes but is not limited to utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The contractor shall maintain a copy of such affidavit for the duration of the contract. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. If this contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination.

Company Name: VistaNational Insurance Group, Inc.

Authorized Signature: Kahlil Hogan

Print Name: Kahlil Hogan

Title: Principal / Director of Operations

Date: 6/24/2021

RESOLUTION NO. _____

A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA, RECOGNIZING MAY 15-21, 2022 AS "NATIONAL PUBLIC WORKS AND PUBLIC SERVICE WEEK"; PROVIDING FOR INCORPORATION OF RECITALS; PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, Public services provided in our community are an essential part of enhancing the lives of every resident of the City of Opa-Locka ("City"). With the direction and support from Management, Public works staff helps to keep our City strong by providing services with focus on infrastructure, transportation, water, wastewater, stormwater, solid waste/illegal dumping, public buildings (facilities), parks and ground maintenance; and

WHEREAS, these services could not be provided without the dedicated efforts of professionals at all levels of municipal government and the private sector; and

WHEREAS, since 1960, American Public Works Association (APWA) has sponsored National Public Works Week. Across North America, their more than 30,000 members in the US and Canada use this week to energize and educate the public on the importance of public works to their daily lives: planning, building, managing and operating at the heart of their local communities to improve everyday quality of life; and

WHEREAS, APWA has announced "Ready and Resilient" as the official theme of its 2022 National Public Works Week; and

WHEREAS, the health, safety and comfort of our residents greatly depends on the quality and effectiveness of these services. Our City team is "ready" to perform and is "resilient" when faced with challenges; and

WHEREAS, it is in the public interest for the citizens, civic leaders, and children in Opa-Locka to gain knowledge of and to maintain an ongoing interest and understanding of the importance of public works first responders and public works programs in their respective communities; and

WHEREAS, the City Commission encourages City residents to familiarize themselves with the work performed by public service staff and become more aware of the contributions that everyone makes every day to enhance the quality of life for our residents.

NOW THEREFORE, BE IT RESOLVED BY THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, FLORIDA:

Section 1. RECITALS ADOPTED.

The recitals to the preamble herein are incorporated by reference.

Section 2. AUTHORIZATION

The Commission of the City of Opa-Locka, Florida hereby recognizes May 15-21, 2022 as "National Public Works and Public Service Week", in the City of Opa-Locka.

Section 3. SCRIVENER'S ERRORS.

Sections of this Resolution may be renumbered or re-lettered and corrections of typographical errors which do not affect the intent may be authorized by the City Manager, or the City Manager's designee, without need of public hearing, by filing a corrected copy of same with the City Clerk.

Section 4. EFFECTIVE DATE.

This Resolution shall take effect immediately upon adoption.

PASSED AND ADOPTED this ____ day of _____, 2022.

Veronica J. Williams, Mayor

ATTEST:

Joanna Flores, City Clerk

**APPROVED AS TO FORM AND
LEGAL SUFFICIENCY:**

Burnadette Norris-Weeks, P.A.
City Attorney

Moved by: _____

Seconded by: _____

VOTE:

Commissioner Bass	_____ (Yes)	_____ (No)
Commissioner Davis	_____ (Yes)	_____ (No)
Commissioner Dominguez	_____ (Yes)	_____ (No)
Vice-Mayor Taylor	_____ (Yes)	_____ (No)
Mayor Williams	_____ (Yes)	_____ (No)



City of Opa-locka Agenda Cover Memo

Department Director:	Airia Austin		Department Director Signature:		
City Manager:	Darvin Williams		CM Signature:		
Commission Meeting Date:		Item Type: <i>(Enter X in box)</i>	Resolution X	Ordinance	Other
Fiscal Impact: <i>(Enter X in box)</i>	Yes	No	Ordinance Reading: <i>(Enter X in box)</i>	1st Reading	2nd Reading
		X	Public Hearing: <i>(Enter X in box)</i>	Yes	No
				X	X
Funding Source: <i>Account#:</i>	<i>(Enter Fund & Dept)</i> Ex:		Advertising Requirement: <i>(Enter X in box)</i>	Yes	No
					X
Contract/P.O. Required: <i>(Enter X in box)</i>	Yes	No	RFP/RFQ/Bid#:		
		X			
Strategic Plan Related <i>(Enter X in box)</i>	Yes	No	Strategic Plan Priority Area: Enhance Organizational ☐ Bus. & Economic Dev ☐ Public Safety ☐ Quality of Education ☐ Qual. of Life & City Image ☐ Communication ☐	Strategic Plan Obj./Strategy: <i>(list the specific objective/strategy this item will address)</i>	
		X			
Sponsor Name	Interim City Manager		Department: Public Works and Utilities	Interim City Manager	

Short Title:

A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF OPA-LOCKA, RECOGNIZING MAY 15-21, 2022 AS "NATIONAL PUBLIC WORKS AND PUBLIC SERVICE WEEK" IN THE CITY OF OPA-LOCKA.

Staff Summary:

American Public Works Association (APWA), 2022 National Public Works Week Theme "Ready and Resilient". Public services provided in our community is an essential part for enhancing the lives of every resident of the City of Opa-locka. With the direction and support from Management, Public works staff help keep our City strong by providing services with focus on infrastructure, transportation, water, wastewater, stormwater, solid waste/illegal dumping, public buildings (facilities), parks and ground maintenance.

These services could not be provided without the dedicated efforts of professional at all levels of municipal government and the private sector.

Staff Summary (Continue):

The health, safety and comfort of our resident greatly depends on the quality and effectiveness of these services. Our team is “ready” to perform and is “resilient” when faced with challenges.

We encourage City residents to familiarize themselves with the work performed by public service staff and become more aware of the contributions that everyone makes every day to enhance the quality of life for our residents.

Financial Impact – None

Proposed Action:

Staff recommends approval.

Attachment:

- 1) Announcement: 2022 National Public Works Week Theme “Ready and Resilient” Dates and History.
- 2) About American Public Works Association (APWA).
- 3) 2022 National Public Works Week (NPWW) Theme and Meaning.
- 4) “Ready and Resilient” Signa.

About National Public Works Week

2022 Dates

May 15-21, 2022

2023 Dates

May 21-27, 2023

History

Every year National Public Works Week gets bigger and better. The number of participating municipalities continues to grow, which means the number of citizens who are exposed to the value of public works grows. At APWA one of our main goals is to educate the general public about the value and necessities of public works projects throughout North America, and public works professionals like you are our best ambassadors.

Since 1960, APWA has sponsored National Public Works Week. Across North America, our more than 30,000 members in the U.S. and Canada use this week to energize and educate the public on the importance of public works to their daily lives: planning, building, managing and operating at the heart of their local communities to improve everyday quality of life.

APWA encourages public works agencies and professionals to take the opportunity to make their stories known in their communities. The National Public Works Week [How-To Guide](#) and [Downloadables](#) area are available to agencies to assist in the development and implementation of their own individual celebrations. The occasion is marked each year with scores of [resolutions and proclamations](#) from mayors and governors, as well.

<https://npww.apwa.net/npww/resources.aspx>

[Jobs](#) | [Store](#) | [Cart](#) | [Resource Center](#) | [eLearning Portal](#) | [APWA Foundation](#) | [Join](#)[Sign in](#)

About APWA

The American Public Works Association (APWA) serves professionals in all aspects of public works—a fact that sets it apart from other organizations and makes it an effective voice of public works throughout North America. With a worldwide membership more than 30,000 strong, APWA includes not only personnel from local, county, state/province, and federal agencies, but also private sector personnel who supply products and services to those professionals. Membership in APWA is open to any individual, agency, or corporation with an interest in public works and infrastructure issues.

As a comprehensive public works resource, APWA continues in its rich tradition of making a difference both on an individual and professional level. APWA is a not-for-profit, 501(c)(3) organization that prides itself on its ability to provide varied educational and networking opportunities that help public works personnel grow in their professionalism and improve the quality of life in the communities they serve.

AMERICAN PUBLIC WORKS ASSOCIATION

[Sign In](#)**READY
AND
RESILIENT**[2022 Theme and Poster](#)[Proclamations](#)[Downloads](#)[Social Media](#)[Virtual NPWW How-To Guide](#)[How-To Guide](#)[About NPWW](#)

Theme and Poster

2022 NPWW Theme

APWA is proud to announce the theme "Ready & Resilient" for the 2022 National Public Works Week poster. Within every public works professional lies a superhero, which is dramatically represented in this year's poster. Public works professionals are always **READY** to serve their communities and **RESILIENT** as ever in their abilities to pick themselves up off the ground after encountering challenges.

The "Ready & Resilient" theme highlights the ability of these professionals to perform regular public works duties and be ready at a moment's notice to react as first responders during natural disasters and overcome trials seen in the field.

Public works superheroes help keep communities strong by providing an infrastructure of services in transportation, water, wastewater and stormwater treatment, public buildings and spaces, parks and grounds, emergency management and first response, solid waste, and right-of-way management. They are what make our communities great places to live and work. So join us in celebrating these superheroes!

2022 NPWW Poster

Be the first to buy your 2022 National Public Work Week poster in the APWA Store!

Member \$14 | Non-member \$18

[Purchase Now](#)

READY AND RESILIENT