



EST. JUNE 19, 1883

Soboba Band of Luiseño Indians

Soboba Tribal Administration

REQUEST FOR PROPOSALS (RFP)

INSURANCE BROKER SERVICES 2025

Proposals must be received by:

No later than 4:00 pm

May 16, 2024



I. INTRODUCTION

The Soboba Band of Luiseño Indians (SBLI) is requesting proposals from qualified insurance brokers to engage in health insurance services for both its Tribal Members and employees. Specifically, the SBLI is requesting proposals for insured health plans, self-insured health plans, a combination of the two, or any other product that would meet its interests and needs in facilitating healthcare for its tribal members and employees. Firms are advised to carefully review the instructions below.

II. GENERAL INFORMATION

A. The Soboba Band of Luiseño Indians is a federally-recognized tribe, located in Riverside County, CA near the cities of San Jacinto and Hemet.

Total tribal member population is approximately 1,821 with ages ranging from infants to 92 years old. While a large number of Tribal Members reside on the Soboba Indian Reservation, many live off reservation, including some individuals and families who reside out-of-state. The SBLI is governed by an elected Tribal Council and operates various economic-enterprises as part of its self-governance. Tribal Administration includes departments and services such as Accounting, Cultural, Family Services, Environmental, Parks & Recreation, Public Works, Fire, Public Safety, and others. Other enterprises include the Soboba Casino Resort, Soboba Economic Development Corporation, and Legacy Bank. There are approximately 1,737 individuals employed collectively through these various enterprises, listed out separately below:

	Actual	Budgeted
Tribal Administration	312	363
Soboba Casino Resort	1,387	1,580
SEDC	38	44

Brokers responding to this RFP will be evaluated on expertise in the field of health insurance services, experience with tribal insurance, potential cost savings, and customer responsiveness for both Tribal Member and employee insurances.

B. RFP Schedule

Release of RFP	March 22, 2024
Deadline for written questions	April 11, 2024
Responses to questions sent to all responding firms	April 25, 2024



Proposals due	May 16, 2024
Review and interviews to begin	June 3, 2024
Approval of contract	TBD

III. INSTRUCTIONS & PROVISIONS

A. Submission Requirements

To be considered responsive, a proposal must contain the following, referenced by number and in order as detailed below:

1. Vendor Information & Cover Letter:

- a. Name of the insurance agency or brokerage firm including address, telephone number, and contact person for the proposal submission.
- b. Listing of statewide offices and identifying the office from which the SBLI account would be serviced.
- c. Brief description of the history and organization of the bidder's firm and any proposed subcontractor.

2. Background & Project Summary:

- a. Description of the firm's internal organization and how services will be furnished to the SBLI.
 - i. Include and identify those services, which may not be available in the local office but are available from your firm and how services will be accessed.
- b. Provide an example of the structure of servicing a current account similar to the SBLI.

3. Company Experience & Capability:

- a. Copies of business licenses, professional certifications, or other credentials, together with evidence that the organization is in good standing and qualified to conduct business in California.

4. Methodology: Detail the approach and methodology to be used to accomplish the Scope of Work of this RFP. This should include:

- a. An implementation plan that details the:
 - i. methods, including controls by which your firm manages projects of the type sought by this RFP;
 - ii. methodology for soliciting and documenting views of internal and external stakeholders;



- iii. and any other project management or implementation strategies or techniques that the respondent intends to employ in carrying out the work.
 - b. Detailed description of efforts that will be taken to achieve client satisfaction and to satisfy the requirements of the Scope of Work.
 - c. Detailed project schedule, identifying all tasks and deliverables to be performed, durations for each task, and overall time of completion, including a complete transition plan. Include your plan to deal with fluctuation in service needs and any associated price adjustments.
 - d. Detailed description of specific tasks you will require from SBLI staff. Explain what the respective roles of SBLI staff and your staff would be to complete the tasks specified in the Scope of Work.
 - e. Proposers are encouraged to provide additional innovative and/or creative approaches for providing the service that will maximize efficient, cost-effective operations or increased performance capabilities, or any ancillary services.
 - f. Proposers should note that tribal members are eligible for IHS funded services. Experience in coordinating with Indian Health Services care in conjunction with self-insured plans and use of Medicare-like rates and CHEF designations should be detailed.
5. Staffing: Provide a list of individuals(s) who will be working on this project and indicate the functions that each will perform and their anticipated hours of service. Include a resume for each designated individual.

Upon award and during the contract period, if the contractor chooses to assign different personnel to the project, the Contractor must submit their names and qualifications including information listed above to the SBLI for approval before they begin work.

6. Qualifications: The information requested in this section should describe the qualifications of the firm or entity, key staff and sub-contractors performing projects within the past five years that are similar in size and scope to demonstrate competence to perform these services. Information shall include:
- a. Names of key staff that participated on named projects and their specific responsibilities with respect to this scope of work.
 - b. A summary of your firm's or entity's demonstrated capability, including length of time that your firm has provided the services being requested in this Request for Proposal.
 - c. For private Proposers, provide at least five references that received similar services from your firm. The SBLI reserves the right to contact any of the organizations or individuals listed. Information provided must include:



- i. Client name
- ii. Project description
- iii. Project start and end dates
- iv. Client project manager contact information including: name, telephone number, and e-mail address.

Any public entity which submits a Proposal should describe in detail how it currently performs services similar to those identified in the scope of work within its or other jurisdictions. If you have performed these services under contract for another public entity, please provide references for those entities as set forth above for private Proposers.

7. Financial Capacity: Provide the Proposer's latest audited financial statement or other pertinent information such as internal unaudited financial statements and financial references to allow the SBLI to reasonably formulate a determination about the financial capacity of the Proposer. Describe any administrative proceedings, claims, lawsuits, or other exposures pending against the Proposer.
8. Cost Proposal: All Proposers are required to use Attachment B, Cost Proposal to be submitted with their Proposal. Pricing instructions should be clearly defined to ensure fees proposed can be compared and evaluated. Proposals shall be valid for a minimum of 180 days following submission.
9. Disclosure: Please disclose any and all past or current business and personal relationships with any current SBLI elected official, appointed official, employee, or family member of any current SBLI elected official, appointed official, or SBLI employee. This includes individuals described above within any enterprise owned by the SBLI, including Soboba Casino Resort, Soboba Economic Development Corporation, or Legacy Bank CA. Any past or current business relationship may not disqualify the firm from consideration.
10. Professional Services Agreement: The firm selected by the SBLI will be required to execute a Professional Service Agreement provided by the SBLI. If a Proposer has any exceptions or conditions to the Agreement, these must be submitted for consideration with the Proposal.
11. Checklist: As a convenience to Proposers, following is a list of the items, included as appendices to this RFP, which should be included with Proposals:
 - a. Vendor Information & Cover Letter
 - b. Company Profile & References
 - c. Ex Parte Communications Certificate
 - d. Cost Proposal



- e. Disclosure of Positions
- f. Disqualifications Questionnaire
- g. Staffing Plan

IV. PROPOSAL SUBMISSION PROCESS

- A. Content: The Proposal must be submitted using the format as indicated in the Proposal format guidelines.
- B. Preparation: Each Proposal shall be prepared simply and economically, avoiding the use of elaborate promotional material beyond those sufficient to provide a complete, accurate and reliable presentation.
- C. Cost: The cost for developing the Proposal is the sole responsibility of the Proposer. All Proposals submitted become the property of the SBLI.
- D. Number: Submit five (5) hard copies plus one electronic copy/flash drive of your Proposal in sufficient detail to allow for thorough evaluation and comparative analysis. In the event of a conflict between the original and any hard copy or disk copy, the original shall control.
- E. Submission: Complete written Proposals must be submitted in sealed envelopes marked and received no later than 4:00 p.m. (P.S.T) on May 16, 2024 to the address below. Proposals will not be accepted after this deadline. Faxed or e-mailed Proposals will not be accepted. Mailed copies must be delivered by FedEx or UPS; USPS will not deliver to the Reservation. NO EXCEPTIONS.

**Soboba Band of Luiseño Indians
Tribal Administration
23906 Soboba Road
San Jacinto, CA 92583**

- F. Inquiries: Questions about this RFP must be submitted via email to Steven Estrada at sestrada@soboba-nsn.gov.
- G. Rejection of Proposal: The SBLI reserves the right in its sole discretion to reject any or all proposals in whole or in part, without incurring any cost or liability whatsoever. All proposals will be reviewed for completeness of the submission requirements. If a proposal fails to meet a material requirement of the RFP, or if it is incomplete or contains irregularities, the proposal may be rejected. A deviation is material to the extent that a proposal is not in substantial accord with RFP requirements. Immaterial deviations may cause a bid to be rejected. The SBLI may or may not waive an immaterial deviation or defect in a proposal. The SBLI waiver of an immaterial deviation or defect shall in no way modify the RFP or excuse a bidder from full compliance with the RFP requirements.



Any proposal may be rejected where it is determined to be not competitive, or where the cost is not reasonable.

Proposals that contain false or misleading statements may be rejected if, in the SBLI's opinion, the information was intended to mislead the SBLI regarding a requirement of the RFP.

V. Evaluation Criteria & Selection Process

An evaluation team will review in detail all proposals that are received to determine the Highest Scored Bidder ("HSB"). Composition of the evaluation team will not be disclosed to any firms.

The SBLI reserves the right to determine the suitability of proposals based on a proposal's meeting administrative requirements, technical requirements, the review team's assessment of the quality and performance of the equipment and services proposed, and cost.

During the evaluation process, the SBLI may require a bidder's representative to answer questions about the proposal and/or require certain bidders to make a formal presentation to the evaluation team and/or the Tribal Council.

The following criteria will be used in reviewing and comparing the proposals and in determining the HSB. The weight to be assigned to each criterion appears following each item.

VI. Award and Execution of Contract

Subject to the SBLI's right to reject any or all proposals, the HSB may be awarded the contract. Written notice will be sent to bidders with the SBLI's decision on their specific submissions. It is anticipated that the final selection of the HSB will be made around July. The evaluation team will recommend proposals, subject to RFP requirements, to the Tribal Council who will make the final selection. Upon selection, the SBLI and the selected Broker will enter into good faith negotiations on a contract containing, without limitation, the Statement of Work and Contracting Requirements sections below.

No contract or agreement, express or implied, shall exist or be binding on the SBLI before the execution of a written contract by both parties. If agreement on the terms of such a contract cannot be reached after a period deemed reasonable by the SBLI in its sole discretion, the SBLI may enter into negotiations and sign a contract with any other bidder who submitted timely, responsive and responsible proposals to this RFP.

If, after the SBLI and the HSB agree to terms and execute a contract, that contract is terminated for any reason, the SBLI may, in its sole discretion, either enter into negotiations



with the next highest-scored bidder or issue a new RFP and begin the proposal process anew.

VII. Questions Regarding the RFP

Questions regarding the RFP may be addressed in writing to Steven Estrada at sestrada@soboba-nsn.gov. All questions must be submitted no later than 10 days before the date for submission of proposals. Questions and answers regarding the RFP may be shared with all bidders known to be interested in submitting a proposal.

If a question relates to a proprietary aspect of its proposal and the question would expose proprietary information if disclosed to competitors, the bidder may submit the question in writing, conspicuously marking it as "CONFIDENTIAL." With the question, the bidder must submit a statement explaining why the question is sensitive. If the SBLI concurs that the disclosure of the question or answer would expose proprietary information, the question will be answered, and both the question and answer will be kept confidential. If the SBLI does not concur regarding the proprietary nature of the question, the question will not be answered in this manner and the bidder will be notified.

A bidder who believes that one or more of the RFP's requirements is onerous or unfair, or unnecessarily precludes less costly or alternative solutions, may submit a written request that the RFP be changed. The request must set forth the recommended change and the reason for proposing the change. The SBLI must receive any such request no later than 5 days before the deadline for submitting proposals.