



# GROUP INSURANCE CONSULTING SERVICES

## REQUEST FOR PROPOSALS

January 27, 2025

*Proposals are due by or before 10:00 AM, Tuesday, February 11, 2025*

**1.0 General Information**

The information which follows is integral to this Request for Proposals (RFP) and should, along with the balance of this document, be read in its entirety:

1.1 The Tarrant Appraisal District (TAD) is a political subdivision of the State of Texas, having been established under the Texas Property Tax Code by the Texas Legislature in 1979. The district is responsible for the appraisal of, and arriving at fair market values for, property subject to ad valorem taxation in Tarrant County, Texas.

1.2 TAD is seeking competitive proposals from qualified vendors to provide fixed-fee consulting services relative to its group medical (for both active employees and eligible retirees), dental (indemnity and managed care plans), long-term disability, term life/accidental death and dismemberment (both standard and voluntary life/AD&D plans) Short Term Disability, Vision, HSA and/or some variations of these insurance coverages.

1.3 TAD insurance programs presently cover active employees, eligible COBRA participants, and retirees (including retiree spouses). Voluntary dependent medical, dental, and life/AD&D coverages are also available to active employees at their expense. Following is an enumeration of TAD’s current and contracted providers:

	Previous	Current
Medical Insurance	Blue Cross Blue Shield of Texas – 1/1/24-12/31/24	Blue Cross Blue Shield of Texas – 1/1/25-12/31/25
Dental & Voluntary Vision Insurance	Blue Cross Blue Shield of Texas – 1/1/24-12/31/24	Mutual of Omaha – 1/1/25-12/31/25

	Previous	Current
Retiree Medical Insurance	Blue Cross Blue Shield of Texas Medicare – 1/1/24-12/31/24	Blue Cross Blue Shield of Texas Medicare – 1/1/25-12/31/25
Term Life and Accidental Death & Dismemberment; Voluntary Life and Accidental Death & Dismemberment	Lincoln Financial – 1/1/24-12/31/24	Mutual of Omaha – 1/1/25-12/31/25
Long-Term and Short-Term Disability Insurance	Lincoln Financial – 1/1/24-12/31/24	Mutual of Omaha – 1/1/25-12/31/25
HSA Administration	HSA Bank – 1/1/24-12/31/24	HAS Bank – 1/1/25-12/31/25

1.4 Higginbotham Inc. has provided TAD with insurance consulting services and assistance, for a fixed monthly fee, during the contract period which began on March 1, 2024, and will terminate on February 28, 2025.

1.5 While open to consideration of alternative plans in the future, TAD is currently self-billed on its Mutual of Omaha Insurance offerings; TAD provides a health savings account. It is fully funded under a premium-only payment welfare benefits plan.

1.6 The term of this contract is for 1 year and includes TAD's option to renew for (4) four additional (12) twelve-month periods.

## **2.0 Scope of Services**

2.1 The selected vendor shall, at a minimum, represent the best interests of TAD in providing these services and work products in conjunction with TAD's group medical (for active employees, their dependents, and retirees), dental, life, accidental death and dismemberment, and long-term disability insurance, short-term disability voluntary insurance, voluntary vision insurance, voluntary long-term care insurance, and HSA administration.

2.2 For TAD budgeting purposes, furnish written recommendations projections, by or before April 1 of each year, as to how much and/or what percentage increase/decrease TAD should budget for the next following fiscal year. TAD's fiscal year coincides with the calendar year.

2.3 Keep TAD informed of such changes in the relevant insurance sector as might affect and influence TAD insurance costs and benefit plans; Provide information on product trends and new benefits options within the insurance industry.

2.4 Provide periodic reports of the most recent and available claims experience and other pertinent data from other TAD insurance providers other than the Texas Association of Counties medical offerings. This information will include the dental, vision, life insurance products, short term disability and long-Term disability insurance whose coverage contracts. The Dental contract will end December 31, 2025. The other products have a rate guarantee of 2 years that expires on December 31, 2026.

2.5 This data should include but is not limited to plan costs vs. premiums paid, utilization review, plan trends, and like data and information. This information will subsequently be incorporated into TAD's request for insurance proposals. This reporting should be not less frequently than once each calendar quarter.

2.6 Should it be deemed necessary, approximately five months before contract expiration, two RFP's will need to be prepared. 1.) The retiree insurance supplement and 2.) The group medical (for active employees, their dependents, and retirees), dental, life, accidental death and dismemberment, and long-term disability insurance, short-term disability voluntary insurance,

voluntary vision insurance, voluntary long-term care insurance, and HSA administration and any other offerings for insurance coverages. RFP's will be distributed to qualified insurance providers, all in accord with applicable state public purchasing statutes and TAD purchasing policies. Provide TAD with a list of company names, addresses (with their telephone and e-mail addresses) of insurance companies which are deemed qualified to be prospective insurance providers. TAD will be responsible for placement of TAD-paid newspaper advertisements to publicly solicit proposals in coordination with the distribution of the RFP.

2.7 Assist potential insurance providers with accurate and timely information, data, and answers to their questions, so as to help ensure their full understanding of the RFP. Ensure carriers punctual submission of thoroughly completed proposals per TAD RFP guidelines.

2.8 Attend the retiree and any future proposal opening, subsequently evaluate all insurance proposals received and, at a minimum and as applicable, timely provide TAD with comparative analyses of current plan versus proposed plan benefits, premium rates/costs, co-pays, deductibles, formulary categorical inclusions/exclusions (e.g., generic, brand, non-brand, and mail order), hospital and physician or dentist provider networks/disruptions, financial ratings/conditions, customer service ratings/statistics, references, and/or such other relevant data and information as will help TAD make fact-based and informed decisions.

2.9 Based on the above data and analysis, and as directed by TAD administrative staff, provide renewal alternatives with cost impact of benefit plan changes, review and evaluate carrier projections and other relevant comparisons, negotiate with one or more insurance providers regarding premium rates, benefits plans, and other elements of their proposals, all in an effort to arrive at "best and final" proposals for recommendation by TAD's administrative staff to TAD's Board of Directors.

2.10 Review and assist TAD administrative staff in the preparation of formal written insurance contract award recommendations for presentation to, and consideration by, TAD's Board of Directors.

2.11 If requested, attend and participate in the TAD Board of Directors meeting(s) during which consideration of insurance contract awards are scheduled to occur.

2.12 Help TAD administrative staff with finalizing group applications and contractual arrangements with the Board-approved insurance providers, including, but not limited to, participation agreements, plan benefits and related benefits summaries, insurance booklets and/or certificates, premium and co-pay rates, etc;

2.13 Help organize and participate in TAD employee open enrollment sessions. These sessions may take one or more full business days. Provide printed open enrollment materials for all TAD employees and future new hires. Create and maintain secure online enrollment video specific to TAD employee benefits program. Coordinate with carriers to attend in person open enrollment meetings, as necessary. Provide insurance carriers timely open enrollment employee updates; to ensure accurate enrollment within the carrier portals.

2.14 Assist, as necessary with implementation and management of TAD wellness program.

Coordinate annual biometric screen and preventive shot clinic. Keep TAD up to date of new industry wellness trends;

2.15 Assist TAD in periodically reviewing and analyzing alternative approaches to its overall benefits program, including health reimbursement accounts, health savings accounts, cafeteria plans, self-funded plans, cooperative arrangements with other public entities, and others. Provide general information and guidance to assist with compliance with ERISA, FMLA, USERRA, Medicare part D and other federal legislation that directly affects the administration and plan benefits. Provide template or sample compliance notices, certificates of creditable coverage and enrollment forms as reasonably requested by TAD. Provide legislative updates that affect TAD; review and evaluation of COBRA and HIPAA compliance procedures.

2.16 Respond to, and keep TAD abreast of, inquiries from insurance companies and other parties who might be prospective insurance providers for TAD and who should be placed on TAD's RFP vendor mailing list.

2.17 Assist, if requested by TAD and as needed, with the transition between insurance providers when such changes occur.

2.18 Assist, as requested and/or referred by TAD administrative staff, with resolving billing problems, employee and retiree benefits questions and issues, and other insurance-related problems and questions.

2.19 Assist, as requested by TAD administrative staff, in organizing and possibly participating in annual day-long "health fair" events to inform and educate TAD employees and retirees regarding fitness/exercise, weight loss/proper dieting, healthy eating, smoking cessation, and similar topics.

### **3.0 Optional Services for Year #2, Year #3 and Year #4**

3.1 Vendor may need to provide the following services, listed below, in Year #2, Year #3 and Year #4. Currently, TAD's insurance provider is TAC (Texas Association of Counties) and TAC is providing these services for Medical only for TAD through December 31, 2025. If TAD does not select TAC in Year #2, Year #3 or Year #4, then these services will need to be provided by the vendor. The cost submission form will have a place to price these services should the vendor need to provide these services in Year #2, Year #3 or Year #4. Below is a list of services vendor will need to provide should TAD not renew with TAC;

- A. Provide information on the plan performance, the overall pool performance, and will assist the group in planning for future years.
- B. Attend open enrollment events, health fairs and other events as requested.
- C. Create and present mid-year review along with sharing what changes could

be made to increase plan performance.

D. Provide reporting as requested or on a scheduled basis.

#### **4.0 PlanSource Benefit Administration System**

4.1 TAD's current Benefit Administration System is PlanSource. The current contract between TAD and PlanSource is set to expire on April 27, 2025. As of this writing, TAD does not plan to renew with PlanSource. TAD has entered into a new contract with Paylocity which will replace our current benefit administration system.

4.2 The vendor must be able to assist with implementation, update and maintenance of third-party employee enrollment portal. To include but not limited to benefit updates, contribution updates, salary updates and reporting updates. Manage employee enrollment portal timelines to ensure timely open enrollment. Perform open enrollment testing to ensure accuracy before open enrollment. Manage and maintain third-party enrollment portal contact.

4.3 Below is a detailed listing of services provided by PlanSource.

The PlanSource system is currently being used for all employee benefits. It is used during open enrollment each year for the enrollment of all benefits, and it is also utilized throughout the entire year for new hires, promotions and terminations. This system calculates the premium deductions for a bi-weekly pay period for the employer and employee. PlanSource also calculates the premiums for each benefit, including the production of a monthly report for Basic Life Insurance and AD &D, Voluntary Life Insurance and AD &D, Short Term Disability and Long-Term Disability for submission to Mutual of Omaha, for which we are on a self-bill contract.

#### **5.0 Minimum Credentials/Experience**

At a minimum, vendors (including anyone contemplated to work on this account) should satisfy these requirements and preferences:

5.1 Must be currently licensed by the Texas Department of Insurance as a general lines agent authorized to sell life, accident, health, and HMO insurance in Texas;

5.2 Must have one or more staff members with at least five continuous years of in-depth experience in actively, responsively, and successfully representing (per the scope of work outlined above) clients with 150 or more insured employees, with that insurance encompassing, at a minimum, group medical, dental, long-term disability, and life plans;

5.3 Must be entirely free of any disciplinary actions (past, present, and/or pending) taken by the Texas Department of Insurance or any other regulatory body; and

5.4 Should, preferably, have one or more staff members who are Certified Benefits

Professionals by the World-at-Work organization.

## **6.0 Client and Insurance Company References**

6.1 Vendors must provide a list of at least three clients (preferably within the Fort Worth-Dallas Metroplex) with 150 or more insured employees for whom they have served as the principal consultant for that client's acquisition and administration of group medical, dental, life, AD&D, and/or long-term disability insurance within the past five years. The list should include the client's name, city/street/zip code mailing address, type(s) of group insurance involved, and the name and telephone number of the client's key contact person, and

6.2 Vendors must provide a list of at least three insurance companies (preferably with offices in the Fort Worth-Dallas Metroplex) with whom it has placed insurance coverage for a client with 150 or more insured employees within the past five years. The list must include the insurance company's name, city/street/zip code mailing address, type(s) of group insurance involved, and the name and telephone number of the insurance company's key contact person in the Fort Worth-Dallas Metroplex for the account.

## **7.0 Cost/Payment**

7.1 As provided for in the attached "Group Insurance Consulting Services Cost Submission Form," monthly flat or fixed fee amounts (to be paid in equal monthly installments by TAD), commissions or fees based on percentages of premiums paid or similar arrangements will NOT be considered. The vendor selected hereunder is to perform its work and provide its services as an independent contractor to TAD and for TAD's benefit. As such, any compensation or items of value received, either directly or indirectly, by the selected vendor from insurance companies and/or their representatives in conjunction herewith will be considered a violation of the selected vendor's contract with TAD and may result in contract cancellation and legal action.

7.2 Two originally-signed copies of the completed "Group Insurance Consulting Services Cost Submission Form" should be submitted in a *separate sealed envelope* which is marked "Group Insurance Consulting Services Cost

Submission." This submission envelope should contain *only* the cost submission forms and no other proposal materials.

## **8.0 Terms and Conditions**

8.1 The attached "Group Consulting Services Terms and Conditions" and completed "Group Insurance Consulting Services Cost Submission Form" are, by reference, incorporated into this RFP. This RFP, the Group Consulting Services Terms and Conditions, and the completed cost submission form will automatically be a part of any subsequent contract awards and contracts.

8.2 TAD reserves the right to accept or reject any or all proposals, to waive any irregularities or informalities in any proposals received, to negotiate with those vendors whose proposals are deemed most susceptible of contract award, and, subject to such negotiations, to award the consulting services contract to the firm whose proposal is deemed to be the most

advantageous to TAD, after considering the relative importance of price and the other evaluation factors set forth herein.

## **9.0 Exceptions**

9.1 Any exceptions to, or variances from, the requirements and other provisions of this RFP (including the terms and conditions and the cost submission form) must be noted as “Exceptions” and explained in writing in proposal submissions.

## **10.0 Submissions and Submission Deadline**

In response to this RFP, vendors must submit *two copies each* of the information requested under paragraphs 10.1 through 10.5 below in an envelope(s) marked “TAD Group Insurance Consulting Services Proposal.”

10.1 An explanation of their understanding of the scope of work required herein and the resources (data bases, insurance industry contacts, etc.), capabilities, knowledge, and experience they (as a firm) will apply to successfully and timely accomplish the work and services outlined above;

10.2 By individual staff member name, identify the job title, role(s) they will perform, pertinent individual background, past employers, previous clients served, years of experience with the various types of group insurance TAD carries and with cafeteria, welfare benefits, and self-funded plans, Texas Department of Insurance agent license type/number/expiration date, special professional certifications and designations currently held, existence or non- existence of any regulatory disciplinary actions (past, present, or pending), and such other information as will help TAD determine the qualifications and expertise of those who will be working directly and indirectly on this assignment;

10.3 Per paragraph 6.0 above, two separate reference lists, one pertaining to clients and the second embracing insurance companies, must be furnished;

10.4 Per paragraph 9.0 above, an explanation of any exceptions to, or variances from, the provisions of this RFP; and

10.5 Any other information and materials the vendor believes would assist TAD in evaluating its credentials and qualifications to provide the services specified in this RFP.

10.6 Per paragraph 7.0 above, two originally-signed copies of the completed “Group Insurance Consulting Services Cost Submission Form” should be submitted in a sealed envelope marked “Group Insurance Consulting Services Cost Submission.” This envelope should contain *only* the cost submission forms and no other proposal submission materials.

10.7 Both marked and sealed “Group Insurance Consulting Services Proposal” and “Group Insurance Consulting Services Cost Submission” envelopes **must be received by TAD by or before 10:00 AM, Tuesday, February 11, 2025**, and should be addressed as follows:



Tarrant Appraisal District  
Attn: Brad Patrick  
2500 Handley-Ederville Road  
Fort Worth, Texas 76118-6909

“TAD Group Insurance  
Consulting Services”

Please also include digital copies of all presented documents with your mailed submission on a flash drive.

Faxed and e-mailed submissions will NOT be accepted.

### **11.0 Proposal Evaluation Criteria**

The following criteria and weights will be used in evaluating vendor proposals:

- 11.1 Relevant proposing firm experience and capabilities – 30% weight;
- 11.2 Relevant credentials/experience of personnel assigned to this engagement – 20% weight;
- 11.3 Cost to TAD – 40% weight; and
- 11.4 Client and insurance company reference reviews - 10% weight.

### **12.0 Questions and Addenda**

Questions pertaining to this Request for Proposals should be directed to Greg Garza at (817) 595-6007 or Brad Patrick (817) 595-6002 or Janet Campanella (817) 595-6010 during normal business hours. Any material information given to one Vendor concerning this RFP will be furnished by an addendum to all Vendors who have been issued this RFP and the addendum/addenda will also be posted on TAD’s website at [www.tad.org/procurement](http://www.tad.org/procurement).

**TARRANT APPRAISAL DISTRICT GROUP  
INSURANCE CONSULTING SERVICES  
TERMS AND CONDITIONS**

These terms and conditions are, by reference, incorporated into and made a part of the Tarrant Appraisal District (TAD) January 27, 2025 “Group Insurance Consulting Services Request for Proposals” and any and all subsequent purchase orders/contract awards.

**Late Proposals**

Proposals received by TAD after the submission deadline will be considered void and unacceptable. TAD is not responsible for lateness or non-delivery of mail, carrier, etc.

**Altering Proposals**

Proposals cannot be altered or amended after the submission deadline. Any interlineations, alterations, or erasures made before opening must be initialed by the signer of the proposal, guaranteeing authenticity.

**Withdrawal of Proposal**

A proposal may not be withdrawn or cancelled by the vendor without permission of TAD for a period of ninety (90) days following the date designated for the receipt of proposals, and vendor so agrees upon submittal of its proposal.

**Funding**

Funds for payment have been provided through the TAD budget approved by its Board of Directors for this fiscal year only. Texas state statutes prohibit the obligation and expenditure of public funds beyond the fiscal year for which a budget has been approved. Therefore, anticipated orders or other obligations that may arise after the end of the current fiscal year shall be subject to budget approval.

**Sales Tax**

TAD is exempt from payment of Texas sales tax and federal excise tax.

**Contract**

This proposal, when properly accepted or approved by TAD, will constitute a contract equally binding between the successful vendor and TAD. No different or additional terms will become a part of this contract except upon written changes agreed upon by the parties.

**Changes**

No oral statement of any person shall modify or otherwise change or affect the terms, conditions, or specifications stated in this contract. All changes to this contract shall be made in writing as agreed upon by the parties.

### **Certificate of Interested Parties (Form 1295)**

The following information regarding Form 1295 Information applies ONLY to an awarded vendor.

In 2015, the Texas Legislature adopted House Bill 1295, which added Section 2252.908 of the Government Code. The law states that a governmental entity may not enter into certain contracts with a business entity unless the business entity submits a disclosure of interested parties to the governmental entity. The disclosure of interested parties will be submitted online via Form 1295 and must be submitted to the governmental entity prior to any signed contract and/or vote by the governing authority.

The Filing Process:

1. Prior to award by TAD, Vendor will be required to log in to the Texas Ethics Commission, [https://www.ethics.state.tx.us/whatsnew/elf\\_info\\_form1295.htm](https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm) and fill out the Electronic Filing Application.
2. Once submitted, the system will generate an electronic Form 1295 displaying a "Certificate Number." Vendor must **print, sign and notarize** Form 1295.
3. **Within ten (10) business days** from notification of pending award by the TAD Purchasing Agent, the completed Form 1295 **must** be submitted to TAD.
4. Vendor will need to repeat the process and obtain a separate Form 1295 each time they enter into a new contract, renew a contract or make modification, and/or amendments to a TAD contract.

Instruction and information are available at <https://www.ethics.state.tx.us/filinginfo/1295/> or you may call the Texas Ethics Commission at (512) 463-5800.

### **PROHIBITION ON CONTRACTING WITH COMPANIES THAT BOYCOTT ISRAEL**

Vendor acknowledges that in accordance with Chapter 2270 of the Texas Government Code, TAD is prohibited from entering into a contract with a company for goods or services unless the contract contains a written verification from the company that it: (1) does not boycott Israel; and (2) will not boycott Israel during the term of the contract. The terms "boycott Israel" and "company" shall have the meanings ascribed to those terms in Section 808.001 of the Texas Government Code. By signing this contract, Vendor certifies that Vendor's signature provides written verification to TAD that Vendor: (1) does not boycott Israel; and (2) will not boycott Israel during the term of the contract.

Revised August 31, 2017.

### **ATTACHMENT – CONFLICT OF INTEREST QUESTIONNAIRE CONFLICT OF INTEREST DISCLOSURE REQUIREMENT**

Pursuant to Chapter 176 of the Local Government Code, any person or agent of a person who contracts or seeks to contract for the sale or purchase of property, goods, or services with a local governmental entity (i.e. TAD) must disclose in the Questionnaire Form CIQ

("Questionnaire") the person's affiliation or business relationship that might cause a conflict of interest with the local governmental entity. By law, the Questionnaire must be filed with TAD no later than seven days after the date the person begins contract discussions or negotiations with TAD, or submits an application or response to a request for proposals or bids, correspondence, or another writing related to a potential agreement with TAD. Updated Questionnaires must be filed in conformance with Chapter 176.

A copy of the Questionnaire Form CIQ is enclosed with the submittal documents. The form is also available at <https://www.ethics.state.tx.us/forms/conflict/>.

If you have any questions about compliance, please consult your own legal counsel. Compliance is the individual responsibility of each person or agent of a person who is subject to the filing requirement. An offense under Chapter 176 is a Class C misdemeanor.

**NOTE: If you are not aware of a Conflict of Interest in any business relationship that you might have with TAD, state Vendor name in the # 1, use N/A in each of the areas on the form. However, a signature is required in the #7 box in all cases.**

TAD Board members are Alan Blaylock, Matt Bryant, Callie Rigney, Gloria Peña, Eric Morris, Michael Alfred, Fred Campos, Rick Barnes and Wendy Burgess. TAD's Chief Appraiser is Joe Don Bobbitt.

### **Ethics**

The vendor shall not offer or accept gifts or anything of value nor enter into any business arrangement with any employee, official, or agent of TAD.

### **Lawful Compliance**

The selected vendor must comply with all relevant federal, state, county and local laws, rules, and/or regulations in the provision of the services and products provided or to be provided herewith.

### **TAD Indemnification**

The selected vendor shall defend, indemnify, and hold harmless TAD and all its officers, agents, and employees from all suits, actions, or other claims of any character, name, or description brought for or on account of any injuries or damages received or sustained by any person, persons, or property due to any negligent act or fault of the selected vendor, or any vendor agent, employee, subcontractor, or supplier in the execution of, or performance under, this contract. The selected vendor indemnifies and will indemnify and save harmless TAD from liability, claim, or demand on its part, and/or the part of its agents, servants, customers, and/or employees whether such liability, claim, or demand arise from event or casualty happening on or within TAD facilities, premises, parking areas, and site or any entrances or approaches to them.

### **Wages**

The selected vendor shall pay or cause to be paid, without cost or expense to TAD, all such wages

and benefits to its employees as required by state and federal law.

**Termination of Contract**

TAD reserves the right to enforce the performance of this contract in any manner prescribed by law or deemed to be in the best interest of TAD in the event of breach or default of this contract. In the event the selected vendor shall fail to perform, keep, or observe any of the requirements/specifications, terms, and/or conditions of this contract, TAD may give the selected vendor written notice of such default and, if same is not remedied to the satisfaction and approval of TAD within five (5) working days of receipt of such notice, default may be declared and all the selected vendor's rights shall terminate. TAD reserves the right to cancel with 30 days prior written notice.

**Assignment**

The selected vendor shall not assign, transfer, sell, or convey this contract, in whole or in part, without the prior written consent of TAD.

**Venue**

This contract will be governed and construed according to the laws of the State of Texas. This agreement is performable in Tarrant County, Texas.

**Silence of Specifications**

The apparent silence of this Request for Proposals as to any detail or to the apparent omission from it of a detailed description concerning any point shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of these specifications shall be made on the basis of this statement.

**TARRANT APPRAISAL DISTRICT**  
**GROUP INSURANCE CONSULTING SERVICES COST**  
**SUBMISSION FORM**

**Proposals are due by or before 10:00 AM, Tuesday, February 11, 2025**

In completing and submitting this form, the vendor is certifying that:

1. He/she has read and fully understands and accepts the scope of services, the terms and conditions, this cost submission form, and the other requirements and provisions presented in the Tarrant Appraisal District (TAD) "Group Insurance Consulting Services Request for Proposals;"
2. The monthly fixed fees indicated below constitute the full and complete "not to exceed" fees for the services and work products specified in the "Group Insurance Consulting Services RFP," and TAD will not be "surprised" with additional or unanticipated charges or costs in conjunction therewith; and
3. TAD reserves the right to accept or reject any or all proposals, to waive any irregularities or informalities in any proposals received, to negotiate with those vendors whose proposals are deemed most susceptible of contract award, and, subject to such negotiations, to award the consulting services contract to the firm whose proposal is deemed to be the most advantageous to TAD, after considering the relative importance of price and the other evaluation factors set forth herein.

In the spaces provided, please indicate the monthly "not to exceed" fee.

<p>Year #1</p> <p>3/1/2025 Through 2/28/2026</p> <p>\$ _____    \$ _____</p> <p><b>Monthly Fee    Total Fee</b></p>	<p>Year #2 (TAD Option)</p> <p>3/1/2026 Through 2/28/2027</p> <p>\$ _____    \$ _____</p> <p><b>Monthly Fee    Total Fee</b></p> <p style="text-align: center;"><b>Optional Services Per Paragraph 3.0</b></p> <p style="text-align: center;">\$ _____</p>
<p>Year #3 (TAD Option)</p> <p>3/1/2027 Through</p>	<p>Year #4 (TAD Option)</p> <p>3/1/2028 Through</p>

2/29/2028

2/28/2029

\$\_\_\_\_\_ \$\_\_\_\_\_  
Monthly Fee Total Fee

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Monthly Fee Total Fee

Optional Services Per Paragraph 3.0  
\$\_\_\_\_\_

Optional Services Per Paragraph 3.0  
\$\_\_\_\_\_

Authorized vendor representative:

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Signature Printed Name Date

\_\_\_\_\_  
Firm Name Email Address

\_\_\_\_\_  
Telephone Number Fax Number

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City, State, Zip