

COVER SHEET**SOUTHWEST FLORIDA WATER MANAGEMENT DISTRICT
REQUEST FOR PROPOSAL****SUBMIT PROPOSALS TO:** SOUTHWEST FLORIDA WATER MANAGEMENT DISTRICT
ELECTRONICALLY THROUGH: WWW.DEMANDSTAR.COM**DIRECT INQUIRIES TO:** Chamanda Burris, Senior Procurement Specialist
Phone: 352-505-2970 E-mail: procurement@watermatters.org**SOLICITATION TITLE: RFP 26-5092 – MEDICARE ADVANTAGE INSURANCE FOR ELIGIBLE RETIREES****DATE POSTED:**
August 28, 2026**PROPOSALS DUE DATE AND OPENING:**
September 15, 2026 at 2:00 p.m., local time**PRE-PROPOSAL CONFERENCE & SITE VISIT: None****QUESTIONS SUBMISSION DEADLINE: September 8, 2026** All questions must be submitted in writing.**VIRTUAL ORAL PRESENTATIONS OR INTERVIEWS: September 30 – October 1, 2026 (Tentative date, time(s) to be determined) (IF REQUIRED)****SPECIFICATIONS:** The Southwest Florida Water Management District (The District) is soliciting the services of a qualified State of Florida licensed carrier for Medicare Advantage Insurance for the District's Medicare-eligible retirees.

Respondent Name:

Reason for No-Response:

Mailing Address:

City-State-Zip:

Telephone Number: () -

Toll-Free Number: () -

Email address for correspondence:

Authorized Signature:

Full Name (please print or type):

Title (please print or type):

I, the above signed, as the Respondent hereby declare that I have carefully read this Request for Proposal (RFP) and its provisions, terms, and conditions covering the equipment, materials, supplies or services as called for, and fully understand the requirements and conditions. I certify that this response is made without prior understanding, agreement, or connection with any corporation, firm, entity, or person submitting a response for the same goods/services (unless otherwise specifically noted) and is in all respects fair and without collusion or fraud. I agree to be bound by all of the terms and conditions of this RFP and certify that I am authorized to sign this response for the Respondent. Upon award to the Respondent and execution by the District below, the terms and conditions of this RFP will be effective and binding upon both parties.

SOUTHWEST FLORIDA WATER MANAGEMENT DISTRICT

By: _____

Brian J. Armstrong, P.G.
Executive Director

Date _____

THE DISTRICT OFFICIALLY POSTS SOLICITATION PACKAGES ON WWW.DEMANDSTAR.COM AND WWW.WATERMATTERS.ORG/PROCUREMENT. THE DISTRICT RECEIVES PROPOSALS THROUGH DEMANDSTAR AT WWW.DEMANDSTAR.COM. THE DEMANDSTAR TIME STAMP WILL BE CONCLUSIVE AS TO THE TIMELINESS OF FILING. IT IS THE RESPONDENT'S RESPONSIBILITY TO ASSURE THAT ITS PROPOSAL IS TIMELY UPLOADED. PROPOSALS RECEIVED AFTER THE DATE AND TIME SPECIFIED WILL NOT BE ACCEPTED. TO MAINTAIN A SECURED SEALED PROCESS ELECTRONIC SUBMISSIONS MAY BE MADE ONLY THROUGH THE DEMANDSTAR PLATFORM. FAXES, EMAILS, OR HAND DELIVERY WILL NOT BE ACCEPTED.

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**SOUTHWEST FLORIDA WATER MANAGEMENT DISTRICT
REQUEST FOR PROPOSAL # 26-5092
MEDICARE ADVANTAGE INSURANCE FOR ELIGIBLE RETIREES**

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PART I - GENERAL CONDITIONS

1.1 PURPOSE.

The purpose of this RFP is to provide guidelines for submission of proposals to qualify for the nature of services described in Part III, hereinafter referred to as the "Project."

1.2 DEFINITIONS.

"Respondent" means any contractor, consultant, organization, firm, college or university, or other entity submitting a response to this RFP. "Sub-Respondent" means any subcontractor providing services to the Respondent that is directly under contract with the Respondent. "District" means the Southwest Florida Water Management District, which is the issuing agency.

1.3 INTERNET AVAILABILITY.

District solicitations, bidding documents (unless exempt and/or confidential), and Addenda are available for review and may be downloaded via the District's Procurement Website, <http://www.watermatters.org/procurement>, and DemandStar at www.demandstar.com.

1.4 DEVELOPMENT COST.

Neither the District nor its representatives will be liable for any expenses incurred in connection with preparation of a response for this RFP. All proposals should be prepared simply and economically, providing a straightforward and concise description of the Respondent's ability to meet the requirements of the RFP.

1.5 CHANGES, DELAYS, AND ADDENDA.

District reserves the right to delay scheduled RFP due dates if determined to be in the best interest of the District.

District solicitations, changes, delays, addenda and questions and answers are available for review and download at <http://www.watermatters.org/procurement> and www.demandstar.com. Potential respondents are responsible for rechecking the websites for any changes or addenda prior to the due date and time.

All interpretations and supplemental instructions will be in the form of written Addenda to the solicitation documents including District answers provided in response to Section 1.12, QUESTIONS, of this RFP. Failure to acknowledge receipt of all Addenda may be grounds for rejection of a proposal.

No interpretation of the meaning of the specifications or other contract documents, nor correction of any apparent ambiguity, inconsistency, or error therein, will be made to any Respondent orally. Prospective Respondents are advised that no other sources are authorized to give information concerning, explaining, or interpreting solicitation or contract documents. Any information obtained from an officer, agent or employee of the District or any other person will not affect Respondent's risks or obligations or relieve it from fulfilling any and all conditions of the contract.

1.6 PRE-PROPOSAL CONFERENCE.

A pre-proposal conference will not be held for this RFP.

1.7 RULES FOR PROPOSALS.

Two or more firms may combine for the purpose of responding to this RFP providing that one is designated as "Prime" Respondent and the other as "Sub-Respondent(s)". The signer of the proposal must declare that any person or entity with any interest in the proposal, as a principal, is identified therein; that the proposal is made without collusion; that it is, in all respects, fair and in

good faith; and that the signer of the proposal has full authority to negotiate for and bind the Respondent stated on the cover page.

1.8 CONTINGENCY FEE.

The Respondent warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the Respondent to solicit or secure this award 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 the Respondent any fee, commission, percentage, gift, or other consideration contingent upon or resulting from the award. For breach or violation of this provision, the District will have the right to terminate this award without liability and, at its discretion, to deduct from the Agreement price, or otherwise recover, the full amount of such fee, commission, percentage, gift, or consideration.

1.9 PROPOSAL FORMAT.

In order to assist the District's review process, proposals are to be prepared utilizing the following format. The evaluation criteria are set forth in Part V, Evaluation Procedures.

The cost/fee schedule containing all price information as defined in Attachment 1, Proposal Response Form shall be submitted as a separate file from any file(s) containing all non-price factors as identified in the Proposal Format section.

1.9.1 Cover Sheet

Respondents must sign and return the Solicitation Cover Sheet with their proposals.

1.9.2 Table of Contents with clear identification of the material by section and page number.

1.9.3 Letter of Transmittal

This letter should not exceed two page and should briefly state the Respondent's understanding of the work to be done and make a positive commitment to perform the work in a timely fashion. It should also give the names of the individuals who will be authorized to make representations for the organization, and their titles, addresses and telephone numbers. This letter must be signed by an official authorized to negotiate for the Respondent.

1.9.4 Organizational Profile and Qualifications

This section of the proposal should provide a description of the Respondent's organization, including location(s), size, range of activities, Project team organization chart, current and projected workloads and any other appropriate information to describe the organization. Key Project team members shall be highlighted on the organizational chart. Copies of any licenses and certifications held shall be included.

1.9.5 Experience and Past Performance

This section of the proposal should provide a history of past and current projects and successful experience with Medicare Advantage insurance for retirees within the last five years for Public Entities within the State of Florida. Emphasis should be given to the organization's experience with similar projects and expertise in the subject field. Highlight any projects that are active Public Entity self-insured accounts.

Experience shall demonstrate the Respondent's accomplishments and ability to effectively complete this Project.

1.9.6 **Professional Resumes and Qualifications**

This section of the proposal should provide a resume for each of the key Project team member identified in Subsection 1.9.4, Organizational Profile and Qualifications, showing their role in the Project, field of expertise, qualifications, and experience for each member of the team of the key Project team member. Copies of any licenses and certifications held by key Project team members shall be included.

1.9.7 **References**

This section of the proposal must provide a minimum of three references from its recent projects similar in scope and complexity to this Project completed or in progress within last five years in Subsection 1.9.5, Experience and Past Performance. References shall be from three separate Public Entities within the State of Florida. The District may not be included as reference provided under this section.

References must be individuals that can be readily contacted and have first-hand knowledge of the Respondent's performance on the specific project performed by the Respondent. It is recommended that each reference contact person be informed that they are being used as a reference and that the District may be contacting them. Failure of references listed to respond to the District's inquiries may negatively impact the evaluation of the Proposal, including rejection of the proposal as non-responsive.

References shall be provided on the forms provided in Attachment 2, Reference Forms.

1.9.8 **Subcontractors (if applicable)**

This section shall list all subcontractors that will be utilized in the execution of Project work. Documentation as provided in Subsections 1.9.4 - 1.9.7 shall also be provided for each subcontractor listed.

1.9.9 **Nature of Services Required**

See Part III, NATURE OF SERVICES REQUIRED, for details.

1.9.10 **Respondent Questionnaire**

This section of the proposal shall include the Respondent's responses to the questions listed in Attachment 4, Respondent Questionnaire. The Respondent shall list and state each question followed immediately by their response to that question in the order of questions provided in Attachment 4, Respondent Questionnaire.

1.9.11 **Cost/Fee Schedule**

This section of the response is addressed in Attachment 1, Proposal Response Form. As stated in Proposal Format section, above, a completed Attachment 1, Proposal Response Form must be provided as a separate file.

1.9.12 **Completion of all Proposal Documents**

In addition to the proposal submission requirements listed in the Subsections 1.9.1 through 1.9.11, all proposal documents and forms listed below must be completely and accurately filled out and submitted with the proposal. Failure to do so could result in rejection of the proposal as non-responsive.

- Addenda Acknowledgement: The Respondent must acknowledge receipt of all written Addenda issued for this RFP on each Addendum Form issued with their proposal
- Attachment 1 – Proposal Response Form
- Attachment 2 – Reference Forms
- Attachment 3 – Affidavit Contracting with Entities in Foreign Countries of Concern

- Attachment 4 – Respondent Questionnaire
- Attachment 5 – Affidavit No Coercion of Labor or Services

1.10 **ORAL PRESENTATIONS, INTERVIEWS, AND/OR WRITTEN ANSWERS TO QUESTIONS.**

The shortlisted Respondents may be required to participate in oral presentations, interviews, and/or provide written answers to questions with/to the Evaluation Committee. The oral presentations, interviews, and written answers to questions provide an opportunity for the Respondents to answer questions to clarify their proposals.

Any presentation or interview with questions and answers should last no more than 60 minutes. The Respondent's key team members, as identified in the proposal, must attend any oral presentation or interview.

Pursuant to Section 286.0113, Florida Statutes, the oral presentations and interviews are exempt from Section 286.011 and Section 24(b), Article I of the State Constitution. A complete recording shall be made of any portion of an exempt meeting. No portion of the exempt meeting may be held off the record.

1.11 **PROPOSAL OPENING.**

The proposal opening will be public, on the date and at the time specified on the Cover Sheet. It is Respondent's responsibility to assure its proposal is uploaded to the DemandStar website before due date and time. Proposals that for any reason are not so received will not be considered. Respondents must submit one complete proposal package electronically through www.demandstar.com. Instructions on how to submit documents are included with this RFP. Proposals that are not received in a timely manner will not be accepted. The DemandStar time stamp will be conclusive as to the timeliness of filing. **THE DISTRICT HAS NO CONTROL OVER WHETHER WWW.DEMANDSTAR.COM IS EXPERIENCING TECHNICAL DIFFICULTIES.** Respondents are responsible for all costs associated with the preparation of their proposal.

The District may make an award within 120 days after the date of the opening, during which period the proposals shall remain firm and shall not be withdrawn. If award is not made within 120 days, the proposals shall remain firm until either the District awards the contract or the District receives written notice from a respondent that its proposal is withdrawn.

TO MAINTAIN A SECURED SEALED PROCESS ELECTRONIC SUBMISSIONS MAY BE MADE ONLY THROUGH THE DEMANDSTAR PLATFORM. FAXES, EMAILS, OR HAND DELIVERY WILL NOT BE ACCEPTED. SOLICITATION PACKAGE DOCUMENTS MAY BE ELECTRONICALLY SIGNED OR SIGNATURES TRANSMITTED ELECTRONICALLY (VIA PDF, ETC.). ELECTRONIC SIGNATURE/TRANSMISSION SHALL BE DEEMED THE SAME AS A HANDWRITTEN SIGNATURE/ORIGINAL EXECUTED COPY FOR THE PURPOSES OF VALIDITY, ENFORCEABILITY, AND ADMISSIBILITY.

Persons may view or listen to the proposal opening by clicking on the "Join Microsoft Teams Meeting" title below. You may also click on or copy and paste the following Teams Link URL into your browser:

The remainder of this page intentionally left blank.

To view or listen to proposal openings:

Join Microsoft Teams meeting on your computer or mobile app via

<https://teams.microsoft.com/meet/22227574107549?p=EcofMxtBKU1ewlSEm8>

Meeting ID: 222 275 741 075 49

Passcode: qy7tM6vg

<https://bit.ly/4walB9W>

Need help? | System reference

Dial in by phone

+1 786-749-6127,,403758549# United States, Miami

Find a local number

Phone conference ID: 403 758 549#

1.12 QUESTIONS.

All questions must be presented in writing to procurement@Watermatters.org and received by the District no later than the date indicated on the Cover Sheet. Inquiries must reference the proposal title, number, and the date of proposal opening. Respondents are responsible to check the websites as specified in the Changes, Delays, and Addenda section, for the District's responses to the questions presented. The District will attempt to answer all submitted questions in a timely manner but accepts no responsibility for response delays.

1.13 CONFLICT OF INTEREST.

The award hereunder is subject to the provisions of Chapter 112, Part III, Florida Statutes, as amended, governing conflicts of interest. All Respondents must disclose with their proposal the name of any officer, director, or agent who is also a public employee. Further, all Respondents must disclose the name of any public employee who owns, directly or indirectly, an interest of five percent or more in the Respondent's firm or any of its branches.

1.14 PROPOSAL WITHDRAWAL.

Proposals may be withdrawn at any time prior to the opening via the DemandStar platform.

1.15 PUBLIC AVAILABILITY OF RECORDS.

Once opened, all proposals will become the property of the District and, at the sole discretion of the District, may not be returned to the Respondent. Any information, reports or other materials given to, prepared or submitted in response to this RFP will be subject to the provisions in Chapter 119, Florida Statutes, commonly known as the Florida Public Records Act. Any Respondent claiming that its proposal contains information that is exempt from the public records law must clearly segregate (separate binder and separate electronic copy PDF file) and mark that specific information as "CONFIDENTIAL", state the reason such information is exempt from public disclosure, and provide the specific statutory citation for such exemption (i.e., Section 815.04, Florida Statutes); otherwise, Respondent waives any possible or claimed exemption upon submission, effective at opening.

The Florida Public Records Act, Section 119.071(1)(b), Florida Statutes, as amended, exempts sealed proposals from inspection, examination, and duplication until such time as the District issues a Notice of Intended Decision pursuant to Section 120.57(3)(a), Florida Statutes, or until 30 days after the proposal opening, whichever is earlier. This exemption is not waived by the public opening of the proposals.

1.16 RESPONSIVE/RESPONSIBLE.

At the time of submitting a proposal, the District requires that the Respondent and its Sub-Respondents be properly licensed and registered to do business in the State of Florida in accordance with applicable Florida Statutes. Proposals that fail to list all Sub Respondents as required in the Proposal Format section, will be rejected as non-responsive. Responses that do

not meet all requirements of this RFP or fail to provide all required information, documents, or materials as provided in the Proposal Format section, may be rejected as non-responsive. Respondents whose responses, past performance, or current status do not reflect the capability, integrity or reliability to fully and in good faith perform the requirements of the proposal may be rejected as non-responsible. The District reserves the right to determine which responses meet the requirements of this RFP, and which Respondents are responsive and responsible. The District reserves the right before awarding the proposal, to require a Respondent and its Sub-Respondents to submit such evidence of their qualifications as it may deem necessary and may consider any evidence available to it of the financial, technical and other qualifications and abilities of a Respondent to perform the work in a satisfactory manner and within the time specified. The Respondent is assumed to be familiar with all federal, state or local laws, ordinances, rules and regulations that in any manner affect the work, and to abide thereby if awarded the contract. Ignorance of legal requirements on the part of the Respondent will in no way relieve responsibility. Respondents must verify the qualifications and performance record of any and all proposed Sub Respondents to ensure acceptability.

1.17 RIGHT TO ACCEPT OR REJECT PROPOSALS.

Proposals which are incomplete, conditional, obscure, or contain additions not contemplated by the RFP or irregularities of any kind, or do not comply in every respect with the RFP may be rejected as nonresponsive at the option of the District. The District does not bind itself to accept the minimum specifications stated in this RFP but reserves the right to accept any proposal which in the judgment of the District will best serve the needs and the interests of the District. The District reserves the right to reject all proposals and not grant any award resulting from the issuance of this RFP. If awarded, no contract will be formed between the Respondent and the District until the contract is executed by both parties.

1.18 PROPOSAL RECAP AND NOTICE OF INTENDED DECISION.

The names of Respondents will be announced at the proposal opening and proposal recap (listing the names of Respondents who submitted a Proposal in response to this RFP) will be posted for review by interested parties on the websites identified in Internet Availability section. Proposal recap will not be provided by telephone, fax, or email.

The Florida Public Records Act, Section 119.071(1)(b), Florida Statutes, as amended, exempts sealed proposals from inspection, examination, and duplication until such time as the District issues a Notice of Intended Decision pursuant to Section 120.57(3)(a), Florida Statutes, or until 30 days after the proposal opening, whichever is earlier.

The District will award the contract in accordance with the Evaluation Procedures section. A Notice of Intended Decision will be posted for review on the websites identified in the Internet Availability section.

1.19 PROTESTS.

Any person who wishes to protest the terms, conditions, and specifications contained in this RFP, or a decision, or intended decision resulting from this RFP, shall file with the District a notice of protest and formal protest in compliance with chapter 28-110, Florida Administrative Code, and applicable provisions in Section 120.57, Florida Statutes. Failure to file a protest within the time prescribed in Section 120.57(3), Florida Statutes, will constitute a waiver of proceedings under chapter 120, Florida Statutes.

1.20 AGREEMENT INFORMATION.

Upon award to a Respondent, and the District's execution of the Cover Sheet of this RFP, both parties agree to be bound by the terms and conditions included in this RFP, notwithstanding any provision in any plan document offer by Respondent. Respondent is obligated to provide the

products and services to the District as provided in its response to this RFP and in accordance with the terms and conditions of this RFP. The District shall not be obligated to prosecute any claims that the District may have against third parties arising out of any occurrence resulting in a payment for eligible claims expenses, as defined by Respondent's plan documents, by the District.

By submitting a response, Respondent agrees to all the terms and conditions of this RFP. Any changes offered by a Respondent in its response will not be considered by the District. The submittal of a response will constitute acknowledgement of all terms and conditions of this RFP and the District will construe the response as though no changes were presented. If a Respondent desires to propose a change to a term or condition of the RFP or Agreement, Respondent must submit its request under the procedure set forth in Section 1.12, QUESTIONS.

The contents of the proposal of the successful Respondent will be incorporated into a written contract document in terms acceptable to the District at its absolute discretion and will be binding on all parties to the executed contract. Failure of Respondent to accept this condition will result in the cancellation of any award. The laws of the State of Florida will govern any contract resulting from this RFP and venue will lie in Hillsborough County, Florida. The District will have the right to examine and audit the successful Respondent's Project-related books, records, documents and papers during the Project and for at least five years following completion date provided such disclosure does not undermine the independence or the validity of the audit process. The successful Respondent will also be required to comply with all applicable laws, rules, regulations, and contract provisions or conditions necessary in the judgment of the District to constitute a sound and complete contract.

1.21 INDEMNIFICATION.

The successful Respondent agrees to defend, indemnify and hold harmless the District, its agents, employees and officers, from and against all liabilities, claims, damages, expenses or actions, either at law or in equity, including attorneys' fees and costs and attorneys' fees and costs on appeal, caused or incurred in whole or in part, as a result of any act or omission by the Respondent, its agents, employees, subcontractors, assigns, heirs or anyone for whose acts or omissions any of these persons or entities may be liable during the Respondent's performance under the Agreement. This provision shall survive the expiration or termination of the Agreement.

1.22 INSURANCE REQUIREMENTS.

The Carrier must maintain during the entire term of this Agreement, insurance in the following kinds and amounts or limits with a company or companies authorized to do business in the State of Florida and will not commence work under this Agreement until the District has received an acceptable certificate of insurance showing evidence of such coverage.

1.22.1. Liability insurance on forms no more restrictive than the latest edition of the Commercial General Liability policy (CG 00 01) of the Insurance Services Office without restrictive endorsements, or equivalent, with the following minimum limits and coverage:

Per occurrence	\$1,000,000
Aggregate	\$2,000,000

1.22.2. Auto liability insurance, including owned, non-owned and hired autos with the following minimum limits and coverage:

Bodily Injury Liability per Person	\$100,000
Bodily Injury Liability per Occurrence	\$300,000
Property Damage Liability	\$100,000

- or -

Combined Single Limit

\$500,000

1.22.3. The District and its employees, agents, and officers must be named as additional insured on the general liability policy to the extent of the District's interests arising from the agreement.

1.22.4. Carrier must carry workers' compensation insurance in accordance with Chapter 440, F.S. Workers Compensation insurance and employers' liability insurance with a limit of not less than

\$1,000,000.

1.22.5. Professional liability (Errors & Omissions) insurance in a minimum amount of

\$1,000,000.

1.22.6. Carrier must obtain certificates of insurance from any subcontractor otherwise the Carrier must provide evidence satisfactory to the District that coverage is afforded to the subcontractor by the Carrier insurance policies.

Carrier must notify the District in writing of the cancellation or material change to any insurance coverage required by the Agreement resulting from this RFP. Such notification must be provided to the District within five (5) business days of the Carrier notice of such cancellation or change from its insurance carrier.

1.23 WITHHOLDING PAYMENT.

The District may, in addition to other remedies available at law or equity, retain such monies from amounts due the Respondent as may be necessary to satisfy any claim for damages, penalties, costs and the like asserted by or against the District. The District may set off any liability or other obligation of the Respondent or its affiliates to the District against any payments due the Respondent under any contract with the District.

1.24 TERMINATION.

Unless otherwise agreed to by the District, any contract resulting from this RFP may be terminated by the District without cause upon thirty (30) days written notice. Termination is effective upon the thirtieth day as counted from the date of the written notice. In the event of termination under this paragraph, the Carrier will be entitled to compensation for all services provided to the District through the end of the month in which the termination is effective and which are within the Statement of Work, are documented in the budget, and are allowed under the Agreement

1.25 ASSIGNMENT.

Except as otherwise provided in this Agreement, the Carrier may not assign any of its rights or delegate any of its obligations under this Agreement without the prior written consent of the District. If the Carrier assigns its rights or delegates its obligations under this Agreement without the District's prior written consent, the District is entitled to terminate this Agreement. If the District terminates this Agreement, the termination is effective as of the date of the assignment or delegation. Any termination is without prejudice to the District's claim for damages.

1.26 VENUE AND APPLICABLE LAW.

All claims, counterclaims, disputes, and other matters in question between the parties to this Agreement, arising out of or relating to this Agreement or the breach of it will be decided in accordance with the laws of the State of Florida and by a court of competent jurisdiction within the State of Florida and Venue will lie exclusively in the County of Hillsborough.

1.27 LAW COMPLIANCE.

The Respondent will abide by and assist the District in satisfying all applicable federal, state and local laws, rules, regulations and guidelines (including, but not limited to, the Americans with Disabilities Act) relative to performance under this RFP. The Respondent will not discriminate against any employee or applicant for employment because of race, color, religion, sex, handicap, disability, marital status or national origin. The Respondent will obtain and maintain all permits and licenses necessary for its performance under this RFP.

1.28 AMERICANS WITH DISABILITIES ACT (ADA).

The District does not discriminate upon the basis of disability. This nondiscrimination policy involves every aspect of the District's functions, including access to and participation in the District's programs, services or activities. Anyone requiring reasonable accommodation or would like information as to the existence and location of accessible services, activities, and facilities as provided for in the Americans with Disabilities Act should contact the District's Human Resources Office, 2379 Broad Street, Brooksville, Florida 34604-6899; telephone (352) 796-7211 or 1-800-423-1476 (FL only); or email to ADACoordinator@WaterMatters.org. If you are hearing or speech impaired, please contact the agency using the Florida Relay Service, 1-800-955-8771 (TDD) or 1-800-955-8770 (Voice). If requested, appropriate auxiliary aids and services will be provided at any public meeting, forum, or event of the District. In the event of a complaint, please follow the grievance procedure located at WaterMatters.org/ADA.

1.29 PUBLIC ENTITY CRIMES.

Pursuant to Subsections 287.133(2) and (3), Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit proposals on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Subsection 287.017, Florida Statutes, for Category Two, for a period of 36 months from the date of being placed on the convicted vendor list. By submitting a proposal to this RFP, the Respondent certifies that it is not on the convicted vendor list. The Respondent further agrees to notify the District if placement on this list occurs.

1.30 SCRUTINIZED COMPANIES OR OTHER ENTITIES.

Pursuant to Section 287.135, Florida Statutes, a company or other entity that, at the time of submitting a bid or proposal for a new contract or renewal of an existing contract, is on the Scrutinized Companies or Other Entities that Boycott Israel List, or is engaged in a boycott of Israel, is ineligible to, and may not bid on, submit a proposal for, or enter into or renew a contract with an agency or local governmental entity for goods or services in the amount of one hundred thousand dollars or more. If the goods or services are in the amount of one million dollars or more, the company or other entity must also not be on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in Iran Terrorism Sectors List or be engaged in business operations in Cuba or Syria. By submitting a Proposal, the Respondent certifies that it is not on any of the lists or engaged in any of the prohibited activities identified above, as applicable based upon the Agreement amount. The District has the option to terminate such contact if the contracting company or other entity is found to have been placed on the Scrutinized Companies or Other Entities that Boycott Israel List or is engaged in a boycott of Israel.

1.31 RESPONSIBLE VENDOR DETERMINATION.

The Respondent is hereby notified that Section 287.05701, Florida Statutes, requires that the District may not request documentation of or consider a vendor's social, political, or ideological interests when determining if the vendor is a responsible vendor.

1.32 **EMPLOYMENT ELIGIBILITY VERIFICATION.**

In accordance with Section 448.095, Florida Statutes, the Respondent, prior to entering into a contract with the District, certifies: (i) it, and any Subcontractor, will be registered with and use the E-Verify system operated by the U.S. Department of Homeland Security to verify the work authorization status of all new employees of the Respondent or Subcontractor, (ii) that during the year prior to making its submission or entering into a contract with the District, no contract of the Respondent was terminated by a public employer in compliance with Section 448.095, Florida Statutes, and (iii) it is and shall remain in compliance with Sections 448.09 and 448.095, Florida Statutes, including securing and maintaining Subcontractor affidavits as required by Section 448.095(5)(b), Florida Statutes. Upon good faith belief that the Respondent or its Subcontractors of any tier have knowingly violated Sections 448.09(1) or 448.095(2), Florida Statutes, the District shall terminate (or order the termination of) their contract. The Respondent shall be liable for any additional cost incurred by the District as a result of its termination. The District's receipt of proof that the Respondent is an E-Verify system participant is a condition precedent to any District contract. Information on how to obtain proof of participation, register for and use the E-Verify system may be obtained via U.S. Department of Homeland Security website: <http://www.dhs.gov/E-Verify>. This provision shall be incorporated into any resulting contract with the District.

1.33 **NO USE OF COERCION FOR LABOR OR SERVICES.**

In accordance with Section 787.06, Florida Statutes, a nongovernmental entity, prior to entering into, renewing or extending a contract with the District, must provide the District with an Affidavit signed by an officer or representative of the nongovernmental entity under penalty of perjury attesting that the nongovernmental entity does not use coercion for labor or services.

1.34 **CONTRACTING WITH ENTITIES OF FOREIGN COUNTRIES OF CONCERN.**

In accordance with Section 287.138, Florida Statutes, by submitting a bid, proposal, or reply to the District, or entering into a contract with the District which would grant the Respondent access to an individual's personal identifying information, the Respondent affirms and shall provide the District with an Affidavit signed by an officer or representative of the Respondent under penalty of perjury attesting the Respondent is not owned by the government of a "foreign country of concern" as defined in Section 287.138(1)(c), Florida Statutes; the government of a foreign country of concern does not have a "controlling interest" as defined in Section 287.138(1)(a), Florida Statutes, in the Respondent; nor is the Respondent organized under the laws of or has its principal place of business in a foreign country of concern.

1.35 **CORRESPONDENCE.**

Unless otherwise notified in writing by the District, correspondence pursuant to this RFP must be sent to the District at the following address:

**Procurement Office (BKV-2-PRO) Building 2
Southwest Florida Water Management District
2379 Broad Street
Brooksville, Florida 34604-6899
E-mail: procurement@watermatters.org**

Proposed Respondents or persons acting on their behalf may not contact any employee or officer of the District concerning any aspect of this RFP, except in writing to the Procurement Service Office as provided in this RFP, until the Notice of Intended Decision is posted and becomes final. Violation of this provision may be grounds for rejecting a proposal.

1.36 **PURCHASES BY OTHER PUBLIC AGENCIES.**

With the consent and agreement of the successful Respondent, purchases may be made under this RFP by other governmental agencies or political subdivisions within the State of Florida. Such purchases will be governed by the same terms and conditions stated herein. This Agreement in no way restricts or interferes with the right of any public entity to procure any or all of these services independently.

PART II - INTRODUCTION

2.1 **GENERAL INFORMATION.**

The Southwest Florida Water Management District (District) hereby solicits proposals for the services of qualified Respondent for the purpose of providing comprehensive Workers' Compensation claims administration services as described in more detail in Part III, Nature of Services Required.

2.2 **BACKGROUND INFORMATION.**

The District was established in 1961 as a flood protection agency. Since then, its responsibilities have grown to include managing the water supply, protecting water quality and preserving natural systems that serve important water-related functions. The District is one of five regional water management districts charged by Chapter 373 of the Florida Statutes to preserve and protect the resources for the people through water resource development, regulatory and other programs.

The District manages the water resources for West-Central Florida as directed by state law. It encompasses roughly 10,000 square miles in all or part of 16 counties and serves approximately 6 million permanent residents.

Central to the mission is maintaining the balance between the water needs of current and future residents, while protecting and maintaining the natural systems which provide the District with its existing and future water supply. The District's services include, but are not limited to, flood control; regulatory programs such as surface water and water use permitting; natural systems management; preservation and restoration of threatened lakes, rivers, streams and estuaries; land management and acquisition; and public education awareness.

2.3 **TERM OF CONTRACT.**

The initial expected term of the Agreement resulting from this RFP is one year, commencing January 1, 2027, and terminating December 31, 2027. The District, in its sole discretion, may extend the Agreement for four additional one-year terms starting January 1st of each subsequent year upon written notification to the Vendor prior to the expiration of the then current term.

2.4 **PAYMENT.**

The District shall pay the successful Respondent in accordance with the Agreement and the Local Government Prompt Payment Act, Part VII of chapter 218, Florida Statutes, upon receipt of a properly documented invoice. Invoices will be submitted monthly to the District electronically at invoices@WaterMatters.org, or at the following address:

Accounts Payable Section
Southwest Florida Water Management District
Post Office Box 15436
Brooksville, Florida 34604-5436

The District's performance and payment obligations pursuant to this Agreement are contingent upon the District's Governing Board appropriating funds in its approved budget for the Project in each Fiscal Year of the Agreement.

2.5 PROPOSAL CALENDAR.

The following is a list of key dates concerning this RFP. All dates are subject to change.

Request for Proposal Issued	August 28, 2026
Deadline For Questions	September 8, 2026
Submission Deadline (2:00 p.m. local time)	September 15, 2026
First Evaluation Committee Meeting (2:00 p.m. local time)	September 29, 2026
Oral Presentations / Interviews - (If Required – Tentative)	September 30 - October 1, 2026
Second Evaluation Committee Meeting - (If Required) (2:00 p.m. local time)	October 6, 2026
Notice Of Intended Decision	*TBD
Agreement Execution	*TBD

**TBD = To be Determined*

PART III – NATURE OF SERVICES REQUIRED

3.1 PURPOSE.

The Southwest Florida Water Management District (District) is soliciting the services of a qualified State of Florida licensed carrier(s) for Medicare Advantage Insurance for the District's Medicare-eligible retirees.

3.2 BACKGROUND.

Section 112.0801, Florida Statutes, provides retirees the option of continuing coverage at their cost. The District currently offers Medicare-eligible retiree participants the option to enroll in (1) a Medicare Advantage plan with Florida Blue (2) PPO medical plan with Aetna or (3) a high deductible health plan with Aetna.

3.3 OBJECTIVES.

The objective of this RFP is to select a Respondent who will provide the best service, pricing, cost management, and flexibility to the District, thus allowing the District to obtain the best overall program, while minimizing cost to the District. Therefore, the District seeks Respondents that will meet the following objectives:

3.4.1 Offer Medicare Advantage Insurance to eligible District Retirees.

3.4.2 Work collaboratively with the District's Broker, to develop a long-term strategy to help control the increase in future claims cost and maintain a meaningful benefit level for the District's retirees.

3.4.3 Provide knowledgeable and comprehensive administration and excellent member service.

3.4 CURRENT COVERAGES.

3.4.1 The District has approximately 67 retirees with medical coverage, whereas 52 are enrolled in the Medicare Advantage Plan. The District currently offers retirees two self-funded

medical insurance plans through a single carrier. These medical plans include one PPO plan (Grandfathered plan) and a High Deductible Health Plan. In addition to the two medical plans, retirees also have the option to enroll in a Medicare Advantage plan. To be eligible for the Medicare Advantage plan, retirees must be enrolled in Part A & B of Medicare.

- 3.4.2 Retirees who receive a Florida Retirement System (FRS) pension have the option to deduct their medical contributions directly from their pension check. Retirees who are not receiving an FRS pension must remit their medical contributions through self-pay.

3.5 **GENERAL PROVISIONS.**

- 3.5.1 After the initial term of the Agreement, the District may renew the Agreement pursuant to Section 2.3, **TERM OF CONTRACT**. The Carrier will provide the District with a Renewal Notice of changes in premium and benefits under the Medicare Plan for the upcoming year at least one hundred twenty calendar days (120) before each annual renewal effective date.

3.6 **SCOPE OF SERVICES.**

- 3.6.1 **Respondent Requirements.** Each Respondent must provide the following items to enable the District to evaluate each Respondent:

3.6.1.1 An A.M. Best rating of at least "A-" is required.

3.6.1.2 Must provide all licenses required to conduct business in the State of Florida with regard to the products and services requested herein. Copies of the following licenses and certificates must be provided at the time of response submittal:

3.6.1.2.1 Copy of 2-15 Health and Life (Including Annuities and Variable Contracts) License.

3.6.1.2.2 Copy of current America's Health Insurance Plans (AHIP) annual certification.

3.6.1.3 In addition to the requirements included in Section 1.9, **PROPOSAL FORMAT**, the Exhibits attached to this RFP must be fully completed for the products and services offered in your response.

3.6.1.3.1 Attachment 1, Proposal Response Form

3.6.1.3.2 Attachment 4, Respondent Questionnaire

3.6.1.4 Employer application.

3.6.1.5 Plan Summary.

3.6.1.6 A copy of any applicable standard Florida governmental or public entity agreements for the services and products offered.

3.6.1.7 Respondents must include, with their proposal, all required executable documents, including but not limited to agreements, contracts, and any other documents that the District will be required to sign in order to engage the Respondent as the Medicare Advantage Provider. Complete submission of all such documents at the time of response is required to avoid delays in finalizing an award.

3.7 **PROJECT RECORDS AND DOCUMENTS.**

- 3.7.1 The successful Respondent upon request, will permit the District to examine or audit all Project related records and documents during or following completion of the Project work at no cost to the District. These records shall be available at all reasonable times for inspection, review, or audit. "Reasonable" shall be construed according to circumstances, but ordinarily shall mean normal business hours of 8:00 a.m. to 5:00 p.m., local time, Monday through Friday. In the event any Project work is subcontracted, the Carrier shall similarly require each Subcontractor to maintain and allow access to such records for inspection, review, or audit purposes. Payments made to the Carrier under this Agreement shall be reduced for amounts found to be not allowable under this Agreement by an audit. If an audit is undertaken by the District, all required records shall be maintained until the audit has been completed and all questions arising from it are resolved. The Carrier will maintain all such records and documents for at least five years following completion of the Project work. If an audit has been initiated and audit findings have not been resolved at the end of the five years, the records shall be retained until resolution of the audit findings, which would include an audit follow-up by the inspector general if the findings result from an external auditor, or any litigation. The Carrier and any Subcontractors understand and will comply with their duty, pursuant to Section 20.055(5), Florida Statutes, to cooperate with the inspector general in any investigation, audit, inspection, review, or hearing.
- 3.7.2 The Carrier shall allow public access to Project documents and materials made or received in accordance with the Public Records Act, chapter 119, Florida Statutes. To the extent required by Section 119.0701, Florida Statutes, the Respondent shall (1) keep and maintain public records required by the District to perform the service; (2) upon request from the District's custodian of public records, provide the District with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided by law; (3) ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the term of this Agreement and following completion of the Project work if the Carrier does not transfer the records to the District; and (4) upon completion of this Project work, transfer, at no cost to the District, all public records in possession of the Respondent or keep and maintain public records required by the District to perform the service. If the Carrier transfers all public records to the District upon completion of the Project work, the Carrier shall destroy any duplicate public records that are exempt or confidential and exempt from public records requirements. If the Carrier keeps and maintains public records upon completion of the Project work, the Carrier shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the District, upon request from the District's custodian of public records, in a format that is compatible with the information technology systems of the District.
- 3.7.3 **IF THE CARRIER HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS by telephone at 352-205-8482, by email at RecordsCustodian@swfwmd.state.fl.us, or at the following mailing address:**

**Public Records Custodian
Southwest Florida Water Management District
2379 Broad Street
Brooksville, Florida 34604-6899**

3.7.4 Any changes to the above contact information will be provided to the Carrier in writing.

PART IV – HISTORIC DATA

4.1 MEDICAL RATES HISTORY.

Rate History	2023 Self-Funded	2024 Self-Funded	2025 Self-Funded	2026 Self-Funded
Medical	Cigna Open Access Plus HDHP	Aetna HDHP Choice POS II Plan	Aetna HDHP Choice POS II Plan	Aetna HDHP Choice POS II Plan
Employee Only	\$873.12	\$909.12	\$882.08	\$995.88
Employee + One	\$1,711.26	\$1,781.82	\$1,728.80	\$1,951.82
Employee + Family	\$1,885.90	\$1,963.66	\$1,905.22	\$2,150.98
Medical	Cigna Open Access Plus Copay Plan	Aetna Medical Copay Plan	Aetna Medical Copay Plan	Aetna Medical Copay Plan
Employee Only	\$1,052.74	\$1,096.16	\$1,063.64	\$1,200.74
Employee + One	\$2,063.36	\$2,148.44	\$2,084.50	\$2,353.40
Employee + Family	\$2,273.92	\$2,367.68	\$2,297.22	\$2,593.56
Blue Medicare				
Premium Per Member Per Month (Retiree Only)	\$267.62	\$246.60	\$257.15	\$338.59
Premium Per Member Per Month (Retiree + Spouse)	\$535.24	\$493.20	\$514.30	\$677.18

4.2 CURRENT MEDICAL CONTRIBUTIONS.

MEDICAL - Open Access Plus HDHP	Aetna (2026)	
Active Employees	District	Employee
Employee Only	\$995.88	\$0.00
Employee + One	\$1936.82	\$15.00
Employee + Family	\$2125.98	\$25.00
Administrative Employees	District	Employee
Employee Only	\$995.88	\$0.00
Employee + One	\$1951.82	\$0.00
Employee + Family	\$2150.98	\$0.00
Retirees	District	Employee
Employee Only	\$0	\$995.88
Employee + One	\$0	\$1,951.82
Employee + Family	\$0	\$2150.98

MEDICAL - Copay Plan		Aetna (2026)	
Active Employees		District	Employee
Employee Only		\$1,164.74	\$36.00
Employee + One		\$2,141.50	\$211.90
Employee + Family		\$2,360.02	\$233.54
Administrative Employees		District	Employee
Employee Only		\$1,188.72	\$12.02
Employee + One		\$2,318.08	\$35.32
Employee + Family		\$2,541.68	\$51.88
MEDICAL – HDHP Choice POS II Plan		Aetna (2026)	
Retirees		District	Retiree
Employee Only		\$0	\$995.88
Employee + One		\$0	\$1,951.82
Employee + Family		\$0	\$2,150.98
BlueMedicare		Florida Blue (2026)	
Retiree		District	Retiree
Per Member Per Month (Retiree Only)		\$0	\$338.59
Per Member Per Month (Retiree + Spouse)		\$0	\$677.18

PART V - EVALUATION PROCEDURES

- 5.1 **REVIEW OF PROPOSALS AND PRELIMINARY EVALUATION.** Timely submitted responsive proposals will be evaluated by an Evaluation Committee consisting of three or more representatives of the District. Each representative will score each proposal using the criteria outlined in Section 5.2, **EVALUATION METHOD AND CRITERIA**. Each Evaluation Committee member will independently complete his or her evaluation of each response. Evaluation Committee members will meet at a public meeting to finalize the preliminary rankings of the proposals. At the Evaluation Committee Meeting, individual raw scores, including the cost schedule weighted score, will be ranked with the overall top-ranked Respondent receiving a ranking of one. The individual rankings will be totaled. The highest-ranked Respondent will be the Respondent with the lowest total score based upon the rankings. In the event of a tie, the raw scores will be totaled, and the Respondent deemed to have the highest rank, will be the Respondent with the highest cumulative raw score.

Any Respondent deciding to appeal any decision made by the District with respect to any matter considered at such meeting, will need a record of the proceedings, and for such purpose, may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal may be based.

5.2 **EVALUATION METHOD AND CRITERIA.**

5.2.1 The District's Broker may provide technical support and may perform an objective analysis and assessment of the responses for District staff, but shall not provide recommendations, scoring, influence scoring, or promote any carriers.

5.2.2 Proposals will be evaluated by the following criteria:

Evaluation Criteria	Total Possible Points
Organizational Profile and Qualifications; Professional Resumes and Qualifications Respondent has demonstrated and described: 1. Company Profile and staffing levels. (5) 2. Qualifications and experience of key Project team members. (5)	10
Experience and Past Performance and References Respondent has demonstrated and described: 1. Experience and Past Performance. (10) 2. References. (5)	15
Nature of Services Required Respondent has demonstrated and described: 1. A clear understanding of project goals and objectives. (5) 2. Ability to perform services and obtain project goals and objectives. (10) 3. Effective project management, controls, and communications. (10) 4. Size of the Medical Provider Network. (10) 5. A detailed solicitation response that is clear and concise, structured and organized, easy to read and navigate, that outlines their methodology and approach to completing the Project and all requirements of this RFP. (10)	45
Technology and Reporting Respondent has described the internet-based portal and reporting functionality. (20)	20
Total Costs Each evaluator will independently assess the Respondent's sealed cost (Attachment 1, Proposal Response Form) based on the overall value of the proposed plan in relation to its cost. Costs will not be scored solely by comparison to the lowest bid; instead, evaluators will determine how well the plan's value justifies the associated cost when assigning points. (10)	10
Total Score	100

5.3 **FINAL EVALUATION AND NEGOTIATIONS.**

The initial preliminary rankings of Respondents are subject to change based upon the oral presentation and final evaluation, if needed, by the Evaluation Committee. The Evaluation Committee will finalize their evaluations in accordance with the criteria set forth in Section 5.2, EVALUATION METHOD AND CRITERIA, at a public meeting and will determine the number of Respondents with whom the District will commence negotiations.

Following the evaluation process described herein, the District will initiate contract negotiations with the highest-ranked Respondent. If negotiations with the highest-ranked Respondent are unsuccessful, the District will proceed to negotiate with the next highest-ranked Respondent. This process will continue in descending order of ranking until a contract is successfully negotiated to the satisfaction of the District, subject to the terms and conditions outlined in this solicitation.

5.4 **FINAL SELECTION.**

Once the final selection has been made, the Notice of Intent to Award will be posted on the District's Internet website (<http://www.watmatters.org/procurement>) and at www.demandstar.com.

**ATTACHMENT 1
PROPOSAL RESPONSE FORM
FOR
REQUEST FOR PROPOSAL #26-5092
MEDICARE ADVANTAGE INSURANCE FOR ELIGIBLE RETIREES**

1 IMPLEMENTATION & SUPPORT – Describe the following:

- A. Implementation Timeline
- B. Member Support
- C. Transition Assistance

2 REQUIRED TO BE SUBMITTED WITH THE PROPOSAL

A. Centers for Medicare & Medicaid Services (CMS) Approval Letter(s) such as:

- H-number (often written as Hxxxx is the contract ID assigned by CMS) or contract approval (approval for their Medicare contract)
- Annual Bid Approval Letter
- Benefit Package Approval (including supplemental benefits)
- Network Adequacy Approval
- Marketing Material Approval (e.g., Evidence of Coverage, Summary of Benefits)
- First Tier, Downstream, and Related Entities (FDRs) compliance documents

B. Summary of Benefits including:

Plan Overview

- Plan name
- Type (PPO, HMO, MAPD, etc.)
- Service area

Costs at a Glance

- Monthly premium
- Deductibles (medical & drug, if applicable)
- Maximum out-of-pocket limit

Medical Coverage Details

- Primary care and specialist visit copays
- Hospital inpatient coverage
- Outpatient services
- Emergency and urgent care
- Lab and imaging (X-ray, MRI, CT, etc.)
- Preventive care

Prescription Drug Coverage for Medicare Advantage Prescription Drug (MAPD plans)

- Tier structure (Tier 1 → Tier 5 or Tier 6)
- Copays/coinsurance by tier
- Preferred pharmacy options
- Mail-order availability

Extra or Supplemental Benefits

- Dental
- Vision
- Hearing aids
- Over-the-counter (OTC) allowance
- Fitness programs
- Transportation
- Telehealth services

C. Rules & Requirements

- Referral requirements (if any)
- Prior authorization details
- Network rules (in-network vs. out-of-network)

D. Contact & Enrollment Information

- Customer service numbers
- TTY hotline
- Website
- Enrollment instructions

E. Evidence of Coverage (EOC) including the following:

- Benefits and services covered
- Costs (premiums, copays, coinsurance, deductibles)
- Rules members must follow
- How the plan works
- Member rights and responsibilities
- Grievance and appeals procedures
- Out-of-network policies

F. Network Provider Listings

G. Formulary Guide

**ATTACHMENT 2
REFERENCE FORMS
FOR
REQUEST FOR PROPOSAL #26-5092
MEDICARE ADVANTAGE INSURANCE FOR ELIGIBLE RETIREES**

REFERENCE FORM 1

Part 1: Respondent's Name:

Respondent's Name: _____

Part 2: Reference Provider Information:

Reference Entity Name: _____

Reference Contact Person: _____

Reference Contact Person's Title: _____

Reference Address: _____

Reference Email Address: _____

Reference Phone No.: _____

Part 3: Project Details performed by Respondent:

Respondent's Project Manager Name: _____

Contract Amount: _____

Date Project Commenced: _____

Date of Completion: _____

Description of Work Performed: _____

Involvement of Respondent's team (list their names and roles on the reference project):

REFERENCE FORM 2

Part 1: Respondent's Name:

Respondent's Name: _____

Part 2: Reference Provider Information:

Reference Entity Name: _____

Reference Contact Person: _____

Reference Contact Person's Title: _____

Reference Address: _____

Reference Email Address: _____

Reference Phone No.: _____

Part 3: Project Details performed by Respondent:

Respondent's Project Manager Name: _____

Contract Amount: _____

Date Project Commenced: _____

Date of Completion: _____

Description of Work Performed: _____

Involvement of Respondent's team (list their names and roles on the reference project):

REFERENCE FORM 3

Part 1: Respondent's Name:

Respondent's Name: _____

Part 2: Reference Provider Information:

Reference Entity Name: _____

Reference Contact Person: _____

Reference Contact Person's Title: _____

Reference Address: _____

Reference Email Address: _____

Reference Phone No.: _____

Part 3: Project Details performed by Respondent:

Respondent's Project Manager Name: _____

Contract Amount: _____

Date Project Commenced: _____

Date of Completion: _____

Description of Work Performed: _____

Involvement of Respondent's team (list their names and roles on the reference project):

**ATTACHMENT 3
AFFIDAVIT
FOR
CONTRACTING WITH ENTITIES IN FOREIGN COUNTRIES OF CONCERN
REQUEST FOR PROPOSAL #26-5092
MEDICARE ADVANTAGE INSURANCE FOR ELIGIBLE RETIREES**

**Statement Under Section 287.138, Florida Statutes
Contracting with Entities in Foreign Countries of Concern**

Pursuant to Section 287.138, Florida Statutes, this statement must be signed by an officer or representative of an entity submitting a bid, proposal, or reply to, or entering into, renewing, or extending, a contract with a governmental entity which would grant the entity access to an individual's personal identifying information.

The entity identified below is not owned by the government of a "foreign country of concern" as defined in Section 287.138(1)(c), Florida Statutes; the government of a foreign country of concern does not have a "controlling interest" as defined in Section 287.138(1)(a), Florida Statutes, in the entity; nor is the entity organized under the laws of or has its principal place of business in a foreign country of concern.

Under penalties of perjury, I declare that I have read the foregoing statement and that the facts stated in it are true.

Entity Name: _____

Authorized Representative/Officer's Printed Name: _____

Authorized Representative/Officer's Title: _____

Signature: _____ Date: _____

**ATTACHMENT 4
RESPONDENT QUESTIONNAIRE
FOR
REQUEST FOR PROPOSAL #26-5092
MEDICARE ADVANTAGE INSURANCE FOR ELIGIBLE RETIREES**

Respondents shall provide answers to the following questions and include with their submission in accordance with subsection 1.9.10:

1. What is your company's current A. M. Best rating?
2. Please identify the current CMS Star Rating for each Medicare Advantage plan proposed including a three-year rating history. Discuss the factors contributing to the plan's rating and any ongoing initiatives designed to maintain or improve Star Rating performance.
3. What is your account service team's average response time to client requests or questions?
4. Describe the services provided by your account service team to retirees.
5. Please confirm you can waive the requirement for a binder check at time of application submission.
6. Does your company (or third-party) process electronic eligibility files via automation or are manual steps necessary? If manual steps are required to process files, please explain this process and impact on processing time.
7. Please specify if your company (or third-party) accepts the HIPAA 834 5010 file layout as well as all other file layouts accepted for automated enrollment. Please provide applicable coding supplements and other applicable file specification documents.
8. What is your company's (or third-party's) standard processing time for electronic eligibility to be updated in all applicable internal systems (eligibility/claims/billing/etc.)? If time varies, please specify for each system.
9. Will your company (or third-party) provide confirmation notification to the group when files are processed? Please provide details related to this notification process (email, requirement of group log into company website, etc.)
10. Please provide implementation time (in days) for initial set-up of automated enrollment (electronic eligibility) of an established group with your company.
11. Will your company be willing and/or able to provide the annual renewal for the services and products you are proposing a minimum of 120 days prior to the renewal date?
12. What additional services are available and what additional costs, if any are associated with those services?

**ATTACHMENT 5
AFFIDAVIT
FOR
MEDICARE ADVANTAGE INSURANCE FOR ELIGIBLE RETIREES**

**Statement Under Section 787.06(13), Florida Statutes
No Use of Coercion for Labor or Services**

Pursuant to Section 787.06(13), Florida Statutes, this form must be completed by an officer or representative of the nongovernmental entity executing, renewing, or extending a contract with a governmental entity.

The entity identified below does not use coercion for labor or services as defined in Section 787.06, Florida Statutes.

Under penalties of perjury, I declare that I have read the foregoing statement and that the facts stated in it are true.

Entity Name: _____

Authorized Representative/Officer's Printed Name: _____

Authorized Representative/Officer's Title: _____

Signature: _____ Date: _____