

# Teacher Retirement System of Texas



## Request for Proposals (RFP)

**Healthcare Enrollment Administration, District Relation Liaison Team,  
and Direct Billing Services**

**Solicitation No. TRS000527**

**NIGP Class/Item Codes: 948-07, 948-48**

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### Anticipated Schedule of Events

|  |  |
|--|--|
| <b>April 16, 2025</b>                          | Issuance of RFP  |
| <b>April 24, 2025, 1:00 p.m., Central Time</b> | Pre-Proposal Conference<br>Attendance is Non-Mandatory.<br>Conference call/virtual meeting information is provided in Section I. Summary of the RFP, Item 12 below.  |
| <b>April 28, 2025, 5:00 p.m., Central Time</b> | Deadline for Submission of Questions   |
| <b>May 16, 2025, 5:00 p.m., Central Time</b>   | Deadline for Submission of Proposals   |
| <b>June 25, 2025</b>                           | Presentations or Interviews by top-scoring Respondents, if requested by TRS. TRS may elect to conduct interviews or presentations as part of the evaluation process. |

Presentation to the TRS Board of Trustees (Board) at a Board Meeting is not anticipated at this time. However, should the Board request it, top-scoring Respondents may be required to present to the TRS Board of Trustees during a Board Meeting.

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# **Solicitation Section I: Summary**

## I. Summary

- 1. Purpose/Overview**

TRS seeks a qualified vendor(s) to provide one or more of the following types of services: (1) TRS-ActiveCare Program enrollment administration and TRS-ActiveCare Program District Liaison Team services; (2) TRS-Care Program direct billing services; and/or (3) TRS-Care Program enrollment administration services.
- 2. Type of Solicitation**

Request for Proposal (RFP)
- 3. Issuing Agency**

Teacher Retirement System of Texas  
Procurement & Contracts  
4655 Mueller Blvd, Austin, TX 78723  
ATTN: Jacob Bledsoe
- 4. Purchasing Authority**

Competitive Procurement per Texas Government Code Section 825.103
- 5. Mandatory Minimum Requirements**

Proposals that do not meet the Mandatory Minimum Requirements shall be rejected as non-responsive and disqualified. The Mandatory Minimum Requirements are listed in Section V: Evaluation Process and Criteria.
- 6. Submission through PAVES**

Respondents are required to submit responses in the TRS Procurement and Vendor E-System (PAVES). Please see "Proposal Submission Instructions" section on how to create a confirmed bidder account to submit a proposal.
- 7. Initial Term**

Initial Term is anticipated to be through two (2) years from the Operational Start Date. A longer Initial Term may be considered based on Proposal strength.
- 8. TRS Optional Renewal Period**

TRS may, at its sole discretion, exercise the option to extend or renew the Contract for up to four (4) additional years beyond the Initial Term.
- 9. TRS Procurement and Contracts Representative for this Solicitation**

Jacob Bledsoe  
Jacob.Bledsoe@[trs.texas.gov](mailto:trs.texas.gov)

## 10. Contact with TRS Staff

All questions and inquiries about this solicitation must **only** be sent to the Procurement and Contracts Representative.

Upon issuance of this Solicitation, Respondents and their representatives shall not discuss the contents of this Solicitation with anyone including other Respondents, potential Respondents or their representatives, other than the TRS Procurement and Contract representative identified in item number 9 above.

Employees and representatives of TRS, other than the TRS Procurement and Contract representative identified in item number 9 above, will not discuss the contents of this Solicitation with any Respondent, potential Respondent, or its representatives.

**Failure of a Respondent or any of its representatives to observe this restriction may result in disqualification of any related Proposal.**

This restriction does not preclude discussions between affected parties for the purpose of conducting business unrelated to this Solicitation.

## 11. TRS Historically Underutilized Business (HUB) Coordinator

Blender Hill  
(512) 542-6867  
[blender.hill@trs.texas.gov](mailto:blender.hill@trs.texas.gov)

## 12. Pre-Proposal Conference

**April 24, 2025, at 1:00 p.m., Central Time.** Pre-Proposal Conference will be held virtually via Microsoft Teams. To be sent the invite, Respondents must e-mail the TRS Representative identified in Item 9 by **April 23, 2025, COB.**

During the pre-proposal conference, TRS will provide an overview of how to register and submit a proposal in PAVES. Potential Respondents are encouraged to attend. Attendance is Non-Mandatory, however, TRS recommends attendance as many topics related to the submission process and requirements will be covered.

By attending the pre-proposal conference, attendees agree to allow TRS to include their name and email in the pre-proposal conference virtual sign-in sheet to be included with an Addendum posted to the Electronic State Business Daily (ESBD) following the conference.

**13. Solicitation Addenda**

Changes to items directly impacting the Solicitation will be posted on the ESBDB located at [www.txsmartbuy.com/sp](http://www.txsmartbuy.com/sp) and posted in PAVES portal as an Addendum. **It is the responsibility of an interested party to periodically check PAVES or the ESBDB for updates to the Solicitation prior to submitting a Proposal.**

**14. Question and Answer Period**

Questions regarding this Solicitation must be submitted in writing through PAVES (Question Round). Telephone inquiries will not be accepted.

**15. Respondent Presentations or Interviews**

TRS may request that top-scoring Respondents present an overview of the Services proposed in their Proposals. The presentations will either be performed virtually or at the TRS offices located at 1900 Aldrich Street, Austin, Texas 78723, on or about the week of **June 25, 2025**; presentation dates and times to be arranged. The number of top-scoring Respondents shall be determined by TRS at its sole discretion.

**16. TX-RAMP**

TRS, at its sole discretion, makes the determination as to whether TX-RAMP certification is required. If TRS determines the Respondent's product/service requires TX-RAMP Certification, TRS will provide written notification to the Respondent. If the Respondent does not have an active TX-RAMP Certification with the Department of Information Resources (DIR), the Respondent shall provide TRS a written proof of a pending TX-RAMP Certification Level II case with DIR for each independent cloud product/service covered under any resulting contract within thirty (30) days of TRS' notification of the TX-RAMP Certification requirement and must have provisional certification prior to the execution of the contract.

To the extent Respondent's TX-RAMP certification application is rejected by DIR, Respondent shall immediately inform TRS in writing. In which case TRS reserves the right to end negotiations with the Respondent and move on to the next most highly qualified Respondent.

**17. Electronic Signatures**

TRS accepts electronic/digital signatures.

# **Solicitation Section II: Definitions**

## II. Definitions

As used in this Solicitation, the following capitalized terms shall have the meaning specified below:

| Term                                   | Definition  |
|--|---|
| BAFO                                   | Best and Final Offer  |
| Business Days                          | All days except Saturdays, Sundays, State holidays, TRS holidays, federal holidays, and banking holidays. Any other references to "days" shall mean all calendar days.  |
| Calendar Year                          | The twelve (12) month period beginning on January 1 and ending on December 31.  |
| Carrier                                | Has the same meaning given it under Section 1575.002 of the Texas Insurance Code.   |
| Contract                               | The formal, written, and legally enforceable contract and amendments thereto between the Parties, executed between TRS and the Respondent awarded the contract as a result of this Solicitation.  |
| Contractor                             | The individual or entity who is selected to carry out the requirements stipulated in this Solicitation pursuant to the Contract.  |
| Contractor Contract Manager            | The person designated by the Vendor to be the point of contact between Vendor and Agency for purposes of scheduling, billing, contract management, and day-to-day management of Services under the Contract.  |
| Contract Execution                     | The date the Contract is executed by the Parties.   |
| Contract Period                        | The period from the execution of the Contract to the Contract's termination or expiration, including the Initial Term plus any optional renewals/extensions.  |
| Days                                   | Calendar days unless otherwise specified.   |
| Dependent                              | An individual as defined by the Texas Insurance Code. For the TRS-Care Program, Dependent is defined in Section 1575.003 of the Texas Insurance Code. For the TRS-ActiveCare Program, Dependent is defined in Section 1579.004 of the Texas Insurance Code.   |
| Deliverable                            | Unit or increment of work required by the Contract, including such items as benefits, services, phase completion, reports, or documents.  |
| District Relations Liaison             | De facto account managers to the TRS-ActiveCare Participating Entities in the region(s) to which they are assigned.   |
| Electronic State Business Daily (ESBD) | The public-facing website in which applicable government entities post certain competitive procurement solicitations:<br><a href="http://www.txsmartbuy.com/sp">www.txsmartbuy.com/sp</a> .   |
| Employee                               | Any individuals who, on behalf of the Respondent, will or may participate in providing Services under any Contract resulting from this Solicitation. The term includes all officers, personnel, replacement personnel, agents, contractors, subcontractors, subcontractor employees, and other representatives of the Respondent, regardless of how employed or contracted by Respondent. |

| <b>Term</b>            | <b>Definition</b>  |
|------------------------|--|
| Financial Interest     | Receiving, or having a right to receive, money or other valuable property or benefits under or in connection with the actual or proposed Contract; holding a position in a business such as a principal, officer, director, trustee, partner, employee, or the like, or holding a position of management; holding any of the outstanding debt of a person directly involved in the proposed or resulting Contract; or owning stock or other interest in the business.                      |
| Fiscal Year (FY)       | The twelve (12) month period beginning on September 1 and ending on August 31.   |
| HMO                    | Health Maintenance Organization  |
| Initial Term           | This period begins on the Operational Start Date and extends until the date provided in the Contract Signature Page (e.g., a two (2) year Initial Term). The Initial Term is made up of Plan Years. See the Contract Signature Page for the Initial Term related to this RFP.  |
| Key Personnel          | Individuals who contribute to the development or execution of the Services in a substantive, measurable way, and whose absence from the Services would be expected to impact the performance of the Contract, including individuals specified as Key Personnel in the Response.  |
| Mandatory              | Required, compulsory, or obligatory.   |
| Operational Start Date | The first day on which the Contractor is responsible for providing services to Participants. The Operational Start Date varies per Program. For TRS-ActiveCare, the Operational Start Date is September 1. For the TRS-Care Program, the Operational Start Date is January 1.  |
| Participant            | An individual enrolled in one of the Programs. For the TRS-ActiveCare Program, Participant means an active employee and their dependents (as defined by Sections 1579.003 and 1579.004 of the Texas Insurance Code) enrolled in the TRS-ActiveCare Program. For the TRS-Care Program, Participant means a retiree, dependent, surviving dependent child, and surviving spouse (as defined by Sections 1575.003 and 1575.004 of the Texas Insurance Code) enrolled in the TRS-Care Program. |
| Participating Entity   | An entity in the TRS-ActiveCare Program who meets the definition of "Participating Entity" in Section 1579.002 of the Texas Insurance Code. Participating Entities are sometimes colloquially referred to as the employer or school district.  |
| Party/Parties          | The entity/entities who enters/enter into a Contract.  |
| Plan(s)                | The health coverage plans offered under the Programs. For the TRS-ActiveCare Program, Plan(s) means the health coverage plan(s) authorized under Section 1579.101 of the Texas Insurance Code and the benefits provided by the Contractor in accordance with the Contract. For the TRS-Care Program, Plan(s) means the health coverage plan(s) authorized under Section 1575.158 of the Texas Insurance Code and the benefits provided by the Contractor in accordance with the Contract.  |

| <b>Term</b>          | <b>Definition</b>   |
|----------------------|---|
| Plan Year (PY)       | A twelve (12) month period during which services are provided to Participants. For the TRS-ActiveCare Program, the Plan Year begins on September 1 and ends on August 31, consistent with the Fiscal Year. For the TRS-Care Program, the Plan Year begins on January 1 and ends on December 31, consistent with the Calendar Year.  |
| PPO                  | Preferred Provider Organization   |
| Program              | The TRS Program under which health care services are provided to Participants. For TRS-ActiveCare, Program means the health benefits program authorized under Chapter 1579 of the Texas Insurance Code, and further described in the Texas Administrative Code rules at 34 T.A.C. Subchapter C Texas School Employees Group Health (TRS-ActiveCare). For TRS-Care, Program means the health benefits program authorized under Chapter 1575 of the Texas Insurance Code, and further described in the Texas Administrative Code rules at 34 T.A.C. Subchapter A Retiree Health Care Benefits (TRS-Care). |
| Proposal             | The submissions by Respondent, including BAFO, presentations, and any other submissions by the Respondent related to the Solicitation.  |
| Relative             | A current or former TRS employee's spouse, father, mother, brother, sister, son or stepson, daughter or stepdaughter, mother-in-law, father-in-law, sister-in-law, brother-in-law, son-in-law, or daughter-in-law.  |
| Respondent           | Each individual or entity that responds to this Solicitation with a Proposal in accordance with the requirements stipulated in this Solicitation.   |
| Retiree              | An individual that meets the definition of "Retiree" in Section 1575.004 of the Texas Insurance Code. For the purposes of this Solicitation, the term "retiree" includes individuals who meet the definitions of a "surviving dependent child" and "surviving spouse," as defined in Sections 1575.003 (2) and (3) of the Texas Insurance Code.   |
| Scope of Work        | The description of the Services specified in the Solicitation, Proposal, resulting Contract, and any attachments and modifications thereto.   |
| Services             | All of the requirements, duties, schedules, locations, and other items listed in the Solicitation; and any other services associated with Respondent's performance under any Contract.  |
| Solicitation         | This Solicitation No. TRS000527, including this document, all attachments, appendices, exhibits, and addenda.   |
| State                | State means the state of Texas.   |
| Subscriber           | For the TRS-ActiveCare Program, Subscriber means an "employee" as defined in Section 1579.003 of the Texas Insurance Code. For the TRS-Care Program, Subscriber means a Retiree as defined in this table.   |
| TRS                  | Teacher Retirement System of Texas, the public entity responsible for the issuance of this Solicitation.  |
| TRS Contract Manager | The person designated by TRS to be the point of contact between TRS and Contractor for the purposes of monitoring Contractor performance and providing day-to-day interaction and instruction during the term of the Contract.  |

# **Section III: Summary of Programs**

### III. Summary of Programs

#### A. Introduction

The Teacher Retirement System of Texas (TRS), a public entity of the State of Texas, issues this Request for Proposals (RFP) #TRS000527 (Solicitation) to solicit proposals from qualified vendors to provide the following types of services:

1. **Category A:** TRS-ActiveCare Enrollment Administration and District Relations Liaison Team Services
2. **Category B:** TRS-Care Direct Billing Services
3. **Category C:** TRS-Care Enrollment Administration Services

TRS desires to contract with one or more experienced vendors capable of providing the Services requested in this RFP, to bring the best value for TRS, according to the terms and conditions of this Solicitation.

#### B. Services to Be Provided

Respondent shall provide Services in accordance with this Solicitation and the Draft Contract (included in PAVES and as a separate Exhibit to this Solicitation).

Respondents are not required to respond to more than one category but may do so. However, preference may be given to Respondents who are able to perform two or more of the categories of services.

#### C. Contracts and Awards

At TRS' sole discretion, TRS reserves the right to make a single contract award, multiple contract awards, contract awards for some but not all categories, or no contract award in connection with this Solicitation. With regard to Category A, TRS at its sole discretion may carve out District Relations Liaison Team Services from the award.

The services to be provided under any Contract for the TRS-ActiveCare Program shall have an Operational Start Date of September 1, 2026. The services to be provided under any Contract for the TRS-Care Program shall have an Operational Start Date of January 1, 2027.

The anticipated Contract Period shall include a two (2) year Initial Term with the option to extend or renew the Contract for up to four (4) additional years beyond the Initial Term. However, at TRS' sole discretion, TRS may consider committing to a longer Initial Term and fewer renewals, up to a maximum Initial Term of six years (e.g., should the respondent satisfactorily demonstrate commitment through its pricing proposal).

#### D. TRS History and Background

##### 1. The Teacher Retirement System of Texas (TRS)

Established in 1937, TRS is a public entity of the State of Texas and has the powers, privileges, and immunities of a corporation, as well as the powers, privileges and immunities conferred upon it by Subtitle C, Title 8 of the Texas Government Code. TRS is governed by a nine-member

Board of Trustees appointed by the Governor of Texas and an executive director. TRS was established by amendment to the Texas Constitution (See Article XVI, Section 67 of the Texas Constitution) and enactment of statutes to provide a statewide teacher retirement system. The original responsibility of TRS was to provide service and disability retirement benefits to teachers and administrators of the public systems of Texas, including institutions of higher education. Membership was expanded by State legislation in 1949 to include all employees in public education. In later years, the Texas Legislature made provisions for health benefits for retirees and active teachers and other active education personnel.

## **2. TRS-Care Program (TRS-Care)**

TRS-Care was established by the 69th Legislature in 1985 and is authorized and governed by Chapter 1575 of the Texas Insurance Code. TRS-Care provides coverage for eligible retirees, their dependents, surviving spouses, and surviving dependent children. This Program is a self-funded entitlement program with Participants directly enrolling with TRS upon a qualifying event, e.g., retirement. The law identifies TRS as the trustee of the TRS-Care Program and provides the general framework within which the Program is to be designed, with TRS being given latitude to devise, implement, and administer the group program. TRS performs eligibility and enrollment functions in-house and contracts for most other services related to the administration of the TRS-Care Program. Retirees submit paper enrollment applications which are manually entered by TRS staff. Enrollment into the TRS-Care health plans is limited to specific events: i) upon retirement, ii) at age 65, and iii) during a special enrollment event. However, the newly created dental and vision plans have annual open enrollment. TRS is seeking a turn-key solution with web self-service to reduce the need for paper applications and manual entry.

## **3. TRS-ActiveCare Program (TRS-ActiveCare)**

In 1995 (74<sup>th</sup> Legislative Session, SB 9), TRS was authorized by legislation to offer a health insurance program for active public-school employees. In 2001 (77<sup>th</sup> Legislative Session, HB 3343), the legislature created what we now refer to as Chapter 1579 of the Texas Insurance Code. This Program is an optional health benefit program for public school entities to offer to their employees. Participants are located throughout the State in both urban/suburban and rural areas. Enrollment functions are performed by a third-party enrollment vendor, with Participating Entities attesting to the Participant's eligibility. The enrollment vendor collects eligibility and enrollment data from each Participating Entity, or their third-party administrator, and provides that data in electronic format to TRS and all appropriate TRS vendors. TRS contracts for most other services related to the administration of the TRS-ActiveCare Program. Please note the District Relations Liaison Team is currently supported by our HPA and PBM. TRS is considering consolidating these resources under one vendor, which may include the enrollment administrator.

There are approximately 1,000 Participating Entities for which TRS administers benefits. That number may fluctuate due to employers entering or leaving TRS-ActiveCare. In December of each year, eligible entities are given the opportunity to elect to join the TRS-ActiveCare Program and must commit to staying for a minimum of five (5) years. Participating Entities may also elect to leave if they have met the five (5) year requirement for staying but must remain out of the Program for five (5) years before they are eligible to return. There are approximately 100 Participating Employers eligible to return to TRS-ActiveCare in Fiscal Year 2027.

## **4. Covered Entity**

TRS is considered a “covered entity” under Title 2 of the Health Insurance Portability and Accountability Act of 1996, Public Law 104-191, 1996, as amended from time to time (HIPAA). As such, TRS must comply with all provisions of HIPAA regarding all privacy and security measures relevant to the operations of the Programs. Additionally, any person or entity who performs functions or activities on behalf of or provides certain services to TRS (as a covered entity) that involve access to protected health information are considered business associates under HIPAA. Thus, TRS requires appropriate Business Associate Agreements (BAA) with such vendors. The BAA is provided as Attachment A of the Draft Contract.

## 5. Resources

Additional information about TRS and the Board are available through the TRS website:  
<https://www.trs.texas.gov>

In particular, information regarding the TRS-Care and TRS-ActiveCare Programs and Plans, including Plan highlights, benefit booklets and more, may be found on TRS’ website as follows:  
TRS-Care (non-Medicare): [https://www.trs.texas.gov/Pages/healthcare\\_trs\\_care.aspx](https://www.trs.texas.gov/Pages/healthcare_trs_care.aspx)  
TRS-Care (Medicare): [https://www.trs.texas.gov/Pages/healthcare\\_trs\\_care\\_medicare.aspx](https://www.trs.texas.gov/Pages/healthcare_trs_care_medicare.aspx)  
TRS-ActiveCare: [https://www.trs.texas.gov/Pages/healthcare\\_trs\\_activecare.aspx](https://www.trs.texas.gov/Pages/healthcare_trs_activecare.aspx)

Texas Government and Insurance Code Chapters referenced in this RFP may be found at:  
[Texas Government Code, Subtitle C, Title 8, Subtitle C Teacher Retirement System of Texas](#)  
[Texas Insurance Code, Chapter 1575 \(TRS-Care\)](#)  
[Texas Insurance Code, Chapter 1579 \(TRS-ActiveCare\)](#)

The TRS health care rules may be found in the Texas Administrative Code:  
[Title 34, Part 3, Chapter 41 Health Care and Insurance Programs](#)

## E. Current Plans

### 1. TRS-ActiveCare Program

TRS-ActiveCare offers the following self-insured Plans:

- a. **TRS-ActiveCare High Deductible (HD).** A Preferred Provider Organization (PPO) High Deductible Health Plan (HDHP) with integrated medical and pharmacy benefits.
- b. **TRS-ActiveCare Primary.** A Primary Care Physician (PCP) directed Health Maintenance Organization (HMO) with integrated medical and pharmacy benefits.
- c. **TRS-ActiveCare Primary+.** A PCP directed HMO with a carved-out pharmacy benefit program.
- d. **TRS-ActiveCare 2.** A PPO plan with a carved-out pharmacy benefit program (closed to new enrollment since 9/1/2017).

BlueCross and BlueShield of Texas (BCBSTX) is the current provider of Health Plan Administrator (HPA) services and Express Scripts, Inc. (ESI) serves as the Pharmacy Benefits Manager (PBM) for these TRS-Active Care Plans. Please note, the HPA contract will be under procurement simultaneously with this procurement, with an Operational Start Date of 9/1/2026.

In addition, one (1) Health Maintenance Organization (HMO) currently offers fully-insured plans to employees of participating employers in select geographic areas. TRS does not anticipate regional HMO products will be offered at the time of the Operational Start Date.

TRS' medical contracts are expiring after the 2026 Plan Year. TRS is in the process of procuring new medical contracts (Solicitation No. TRS000528). The above information is subject to change in accordance with the solicitation.

**2. TRS-Care Program**

TRS-Care provides the following Plans for retirees:

- a. **TRS-Care HDHP.** A PPO HDHP plan with integrated medical and pharmacy benefits for Participants not eligible for Medicare.
- b. **TRS-Care MA.** A fully-insured Medicare Advantage (MA) plan and a carved-out self-funded Medicare Part D plan for Participants enrolled in both Medicare Part A and Part B or Part B only.
- c. **TRS-Care Alternative.** There is a small population in the TRS-Care Alternative plan, which covers Medicare-eligible retirees who face hardship or delay in obtaining Medicare or who are only enrolled in Medicare Part A and have not obtained or maintained Medicare Part B. Eligibility and enrollment for this plan is strictly determined by TRS.
- d. **TRS-Dental.** A fully-insured plan that provides optional coverage for dental services for TRS-Care retirees and their dependents.
- e. **TRS-Vision.** A fully-insured plan that provides optional coverage for vision services for TRS-Care retirees and their dependents.

BCBSTX is the current HPA for the self-funded TRS-Care HDHP and TRS-Care Alternative Plans. UnitedHealthcare is the current carrier for the fully insured TRS-Care Medicare Advantage Plan. Express Scripts, Inc. is the current Pharmacy Benefits Manager (PBM) for all TRS-Care Program Plans, including the Medicare Part D plan. MetLife is the current carrier for TRS-Care Vision and TRS-Care Dental.

TRS' medical contracts are expiring after the 2026 Plan Year. TRS is in the process of procuring new medical contracts (Solicitation No. TRS000528). The above information is subject to change in accordance with the solicitation.

**F. Current Enrollment**

Enrollment in TRS-ActiveCare Plans as of March 2025 is shown below.

| <b>TRS-ACTIVECARE</b>       | <b>Employees</b> | <b>Dependents</b> | <b>Total Participants</b> |
|-----------------------------|------------------|-------------------|---------------------------|
| TRS-ActiveCare HD           | 76,278           | 38,880            | 115,158                   |
| TRS-ActiveCare Primary      | 126,227          | 68,206            | 194,433                   |
| TRS-ActiveCare Primary+     | 64,798           | 39,218            | 104,016                   |
| TRS-ActiveCare 2            | 2,662            | 1,646             | 4,308                     |
| <b>TRS-ACTIVECARE TOTAL</b> | <b>269,965</b>   | <b>147,950</b>    | <b>417,915</b>            |

Retirees on direct billing for TRS-Care premiums as of March 2025 is shown below.

| <b>TRS-CARE</b>       | <b>Retirees</b> |
|-----------------------|-----------------|
| <b>Direct Billing</b> | 252             |

Enrollment in the TRS-Care Program Plans as of March 2025 is shown below.

| <b>TRS-CARE</b>              | <b>Retirees</b> | <b>Dependents</b> | <b>Total Participants</b> |
|------------------------------|-----------------|-------------------|---------------------------|
| <b>Medical Plans (Total)</b> | 185,218         | 32,195            | 217,413                   |
| TRS-Care HDHP                | 44,508          | 13,706            | 58,214                    |
| Medicare Advantage Plan      | 137,703         | 18,328            | 156,031                   |
| TRS-Care Alternative         | 3,007           | 161               | 3,168                     |
| <b>Dental</b>                | 44,045          | 10,975            | 55,020                    |
| <b>Vision</b>                | 42,145          | 10,419            | 52,564                    |
| <b>GRAND TOTAL*</b>          | 188,544         | 36,835            | 225,374                   |

\*Grand Total is the number of unique Participants enrolled in any Plan.

**Solicitation Section IV:  
HUB Subcontracting Plan (HSP)  
Requirements and Information**

## IV. HUB Subcontracting Plan Information

In accordance with Section 2161.252 of the Texas Government Code and 34 Texas Administrative Code "T.A.C." Section 20.285, each state agency that considers entering a contract with an expected value of \$100,000 or more over the life of the contract (including any renewals) shall, before the agency solicits bids, proposals, offers, or other applicable expressions of interest, determine whether subcontracting opportunities are probable under the Contract. If subcontracting opportunities are probable, each state agency's invitation for bids, requests for proposals, or other purchase solicitation documents with an expected value of \$100,000 or more shall state that probability and if probable require a Historically Underutilized Business (HUB) Subcontracting Plan (HSP).

TRS has determined that subcontracting opportunities are probable with this RFP and, therefore, **requires** Respondents to complete the "State of Texas HUB Subcontracting Plan (HSP) Form" located at <https://comptroller.texas.gov/purchasing/vendor/hub/forms.php> and submit it with the Response.

In accordance with 34 T.A.C. § 20.285 (b)(1)(3), **TRS is required to reject any Response that does not include a completed and timely HUB HSP.**

TRS will provide guidance on navigating the State of Texas HUB forms and Respondent is encouraged to seek assistance in completing the HSP from the TRS HUB Coordinator, Blender Hill, at (512) 542-6867 or at [blender.hill@trs.texas.gov](mailto:blender.hill@trs.texas.gov). In accordance with 34 T.A.C. § 20.285 (d)(1)(E), Respondent inquires must be submitted to TRS early enough in time to allow for Respondent to complete all of the necessary steps at least 7 working days prior to submission of the Response. If there are any changes to the information in the HSP after it is submitted, Respondents must obtain prior approval from TRS.

### a. TRS HUB Goals:

For purposes of the solicitation, TRS has determined that this Solicitation falls under the following category:

- Special Trade Contraction – The goal is 50%
- Professional Services – The goal is 10%
- Other Services – The goal is 25%
- Commodities – The goal is 35%

### b. HUB Subcontracting Opportunities for this Solicitation

The National Institute of Government Purchasing (NIGP) Commodity Book class and item codes and commodity descriptions for the services requested under this RFP are listed below. Full commodity descriptions can be found at <https://comptroller.texas.gov/purchasing/nigp/>

The TRS has identified possible HUB subcontracting opportunities listed below related to the Scope of Work under this Solicitation; however, this list should not be considered exhaustive. Additional opportunities may be added at the Respondent's option.

| Class | Item | Description                                     |
|-------|------|---|
| 948   | 07   | Administration Services, Health                 |
| 948   | 48   | Health Care Services (Not Otherwise Classified) |
| 946   | 10   | Accounting and Billing Services                 |

| Class | Item | Description                  |
|-------|------|------------------------------|
| 920   | 48   | Storage Services, Data Media |
| 966   | 61   | Printing                     |

**c. Finding HUB Vendors**

For a list of HUB vendors, Respondent may use the Centralized Masters Bidders List (CMBL) and HUB Directory. Below are instructions on how to search the CMBL:

- Access the CMBL and HUB Directory at:  
<https://mycpa.cpa.state.tx.us/tpasscmbsearch/tpasscmbsearch.do> .
- *CMBL* Page will default to certain fields already checked - ensure that “HUBs Only” is checked.
- Enter Class Code and Item under Multiple Vendor Search (leave Item blank to select any).
- Enter District Number to select specific geographic location (leave district blank to select all).
- Click the Submit Search button.
- *Detail List* page will default to certain fields already checked.
- Check Ethnicity, Gender fields, and Business Description as well as any other fields needed. Click go.
- Identify HUBs on the *Results For CMBL Plus HUBs Search* page (HUB category is on far right of page).
- Select HUB vendor and click on company name. Sometimes a vendor will have more than one listing -use the most current one.
- Confirm that *HUB Status* is “A” (Approved; Active) on the *Vendor Detail* page.
- If vendor appears to meet your needs, then solicit a bid or response of interest.
- Repeat this process until you have found a minimum of three (3) certified HUBs per subcontracting opportunity/area, either identified by the TRS or your company.

# **Solicitation Section V: Evaluation Process and Criteria**

## V. Evaluation Process and Criteria

### A. General

Proposals will be evaluated and selected based on the evaluation criteria and selection process outlined in this Section.

In purchasing and contracting for goods and services, TRS shall select the vendor that represents the best overall value for TRS based on the candidate's qualifications, experience, acceptance of TRS contract terms and conditions, proposed pricing, and other relevant factors that are in TRS best interests and comply with TRS' fiduciary duties.

TRS reserves the right to ask questions or request clarification from any Respondent at any time during the Solicitation process, including each stage of the evaluation process. When responding to a request from TRS for clarification, the Respondent may be required to provide additional documentation to support their Proposal. All such questions shall be provided to the Respondent by the TRS Procurement and Contracts Representative for this Solicitation. TRS, at its sole discretion, may request a meeting for clarifications. TRS shall provide questions in writing ahead of this meeting and shall follow up in writing with TRS' understanding of the Respondent's clarifications.

The Services being procured under this Solicitation are grouped into categories:

1. **Category A:** TRS-ActiveCare Enrollment Administration and District Relations Liaison Team Services
2. **Category B:** TRS-Care Direct Billing Services
3. **Category C:** TRS-Care Enrollment Administration Services

Respondents are not required to respond to more than one category but may do so. Preference may be given to Respondents who are able to perform two or more of the categories of services.

Each Category shall be evaluated separately, however, if a Respondent chooses to respond to one or more Categories and finds that a combination approach would provide a better value to TRS, the Respondent must clearly state that it would like to contract under each applicable Category and how doing so would affect the Services under each Category to the benefit of TRS and/or the Participants.

Separate Contracts may be issued for each Category or a Respondent may be awarded a Contract for multiple Categories. At TRS' sole discretion, TRS reserves the right to make a single contract award, multiple contract awards, contract awards for some but not all categories, or no contract award in connection with this Solicitation. With regard to Category A, TRS at its sole discretion may carve out District Relations Liaison Team Services from the award.

### B. Mandatory Minimum Requirements

Certain qualifications must be met for the Proposal to be eligible for consideration (hereinafter referred to as "Mandatory Minimum Requirements"). TRS shall review the Proposals for compliance with the Mandatory Minimum Requirements listed below. TRS' review of the Mandatory Minimum Requirements shall be made on a **pass/fail basis**. Failure to meet Mandatory Minimum Requirements may, at any time, result in disqualification of the Respondent's Proposal without further consideration or evaluation. Those Proposals which pass all Mandatory Minimum Requirements shall advance to the next round (Initial Round).

Proposals that do not meet the following Mandatory Minimum Requirements shall be rejected as non-responsive and disqualified:

1. Submission of completed and timely HUB HSP; and
2. Compliance with the submission requirements detailed in PAVES, including the following minimum qualifications:
  - a. **Category A:** TRS-ActiveCare Enrollment Administration and District Relations Liaison Team Services
    - i. Respondent must be a professional firm that provides enrollment services for a minimum of 500,000 covered lives and has a minimum of five (5) years of experience providing healthcare enrollment platforms. Respondent must Provide detailed examples (applicable projects, project dates, client name, and covered lives) to document years of experience and number of members supported.
    - ii. Respondent must agree not to store or transfer any TRS Confidential Information and Information outside of the United States (including backup centers and disaster recovery locations). Respondent must confirm they are capable of meeting this requirement.
  - b. **Category B:** TRS-Care Direct Billing Services
    - i. Respondent must be a professional firm that has a minimum of five (5) years of experience providing direct billing services. Respondent must provide detailed examples (applicable projects, project dates, client name, and a brief synopsis of each project listed) to document years of experience.
    - ii. Respondent must agree not to store or transfer any TRS Confidential Information and TRS Information outside of the United States (including backup centers and disaster recovery locations). Respondent must confirm they are capable of meeting this requirement.
  - c. **Category C:** TRS-Care Enrollment Administration Services
    - i. Respondent must be a professional firm that provides healthcare enrollment services for a minimum of 200,000 covered lives and has a minimum of five (5) years of experience providing customized healthcare enrollment platforms.
    - ii. Respondent must agree not to store or transfer any TRS Confidential Information and TRS Information outside of the United States (including backup centers and disaster recovery locations). Respondent must confirm they are capable of meeting this requirement.

**C. Initial Round**

The Proposals that pass the minimum requirements stage shall be evaluated by an evaluation committee. The TRS evaluation committee may be assisted by non-scoring technical advisors as needed.

Proposals shall be scored under best value standards that are in the best interest of TRS using the following general categories, for which weights are shown.

| <u>Evaluation Criteria</u>                        | <u>Weight</u> |
|---|---------------|
| Respondent past performance and client references | 20%           |
| Performance guarantees                            | 5%            |
| Respondent's Key Personnel                        | 20%           |
| Technical approach                                | 35%           |
| Pricing   | 20%           |
| <b>Total</b>                                      | <b>100%</b>   |

After Initial Round evaluations, TRS may, at its sole discretion, request that all or only the top-scoring Respondents participate in future rounds and may (1) move on to the Interview or Presentation Round, (2) determine that the Interview or Presentation Round is not necessary and move on to the Best and Final Offer (BAFO) Round, or (3) make one or more Contract awards based on the Initial Round evaluations.

The scoring for the Initial Round will not be added to any other round.

#### **D. TRS Option for Interview or Presentations Round – Selection Criteria: 10 points**

TRS may request that all or only the top-scoring Respondents participate in this round. Respondent interviews or presentations allow Respondents to highlight the strengths and unique aspects of their Responses.

Evaluation Criteria for Respondent Presentations Round may include, but are not limited to:

1. Respondent's demonstrated understanding of the RFP requirements and ability to satisfactorily describe the processes/methodologies for delivering the Services.
2. Respondent's demonstrated experience in undertakings similar in scope and complexity to those indicated in this Solicitation, including past performance.
3. Respondent's presentation quality and ability to meet TRS' needs.

Interviews/Presentations shall be evaluated using consensus scoring, and on a scale from 0 to 10, with 10 being the best/highest score. The point allocation for the Interview/Presentation Round will not be added to any previous round or future round. In the event that TRS chooses to have an Interview/Presentation Round, TRS may make one or more Contract awards based on the Interview/Presentation Round evaluations or TRS use the points to determine which Respondent(s) moves on to the BAFO Round.

The point allocation for the Interview/Presentation Round will not be added to any other round.

#### **E. TRS Option for Best and Final Offer (BAFO) Round (“BAFO Round”)**

If TRS decides to have a BAFO Round, a BAFO may be sought from all Respondents or only the top-scoring Respondent(s) from either the Initial Round or those participating in the Interview or Presentation Round. ***As the BAFO round is an optional round by TRS, TRS strongly encourages the Respondent to provide its best pricing and terms with its initial proposal.***

All information provided during each phase of the evaluation process (including the BAFO Round) may be considered during the BAFO Round. The BAFO Round is scored based on the same criteria, scoring matrix, and point allocation as the Initial Round. The point allocation for the BAFO Round will not be added to any other round.

#### **F. TRS Board of Trustees (Board) Selection**

Presentation to the TRS Board of Trustees (Board) at a Board Meeting is not anticipated at this time. However, should the Board request it, top-scoring Respondents may be required to present to the TRS Board of Trustees during a Board Meeting. The Board has the sole discretion on whether, and when, it will decide to select the awardee of the Contract(s). In the event that the

Board requests presentations, there is no guaranteed number of Respondents that shall be presented to the Board.

The Board selects the Proposal(s) that, in the Board's judgment, represents the best overall value for TRS based on the candidates' qualifications, experience, proposed contract terms and conditions, proposed fees, and other relevant factors. "Best overall value" means a combination of factors that, in the judgment of the Board, are most consistent with the best interests of TRS.

# **Solicitation Section VI: Proposal Submittal Instructions**

## VI. Proposal Submission Instructions

Respondents are required to submit their Proposals to this solicitation through the TRS electronic procurement system called PAVES (Procurement and Vendor E-System). If awarded a TRS contract, the Contractor will also be required to set up a PAVES account which requires:

- 2-factor authentication with a cell phone
- A separate login and password to be created for all Contractor contacts, including the Contractor's accounting department
- All invoices and deliverables must be submitted through the PAVES system

### A. PAVES

Potential Respondents can find information about PAVES on the TRS website at:

[https://www.trs.texas.gov/Pages/procurement\\_PAVES.aspx](https://www.trs.texas.gov/Pages/procurement_PAVES.aspx)

The following instructions have been developed to assist vendors in creating and maintaining a PAVES account:

- [PAVES Basic Navigation for Suppliers](#)
- [New Supplier Registration](#)
- [How to Submit a Proposal](#)
- [How to Activate Supplier Profile](#) (if awarded a contract)

### B. Creating a PAVES Account and becoming a Confirmed Bidder

To become a Confirmed Bidder in PAVES, you must complete the New Supplier Registration process. By submitting your company's information, login credentials will be generated, by which you can access PAVES. You will then be able to add additional company contacts, edit your profile, and bid on TRS solicitations.

The first step is to log into the [PAVES supplier portal](#) and follow the instructions for [New Supplier Registration](#).

If, after submitting your registration, you receive an e-mail stating that your registration has been rejected, this is most likely because your company has already been registered in PAVES. The registration request will only be rejected if the Tax ID Number that is submitted already exists in PAVES. In this case, please contact the PAVES help desk at: [PAVESHelp@trs.texas.gov](mailto:PAVESHelp@trs.texas.gov).

### C. Submitting a Proposal in PAVES

1. Once you are logged into PAVES:
  - a. Click the "Solicitations" tab at the top
  - b. Then click "Show public request for proposals"
2. Click the pencil icon next to the name of the solicitation round in which you wish to participate
3. Click "Participate in RFx"

4. You may be asked to click “I acknowledge receipt of this RFx”
5. Select “WILL BID: our intent is to respond to this RFx”
6. To complete the PAVES Questionnaire and submit a proposal for this solicitation, follow the instructions found in [“How to Submit a Proposal.”](#)
7. Please note that any solicitation documents, including Addenda, will be found in the section called “Round Documents” within the Overview tab of the Initial Round.

#### **D. Question and Answer Period (Question Round)**

All potential Respondents must create an account and review the solicitation before the deadline for submitting proposals. In addition, Respondents should note the deadline to submit questions concerning this solicitation on page 1 under the Anticipated Schedule of Events. Respondents may submit questions to TRS through the PAVES portal by participating in the Question Round of this solicitation and following the instructions found in [“How to Submit a Proposal.”](#)

#### **E. Protest Procedures**

Any protest to this Solicitation or the resulting Contract award shall be governed by 34 Texas Administrative Code § 51.2 (relating to Vendor Protests and Appeals). All protests, appeals, and stay requests, if any, must be timely submitted to [LegalNotices@trs.texas.gov](mailto:LegalNotices@trs.texas.gov)