



Request for Qualifications (RFQ) Questions & Answers

Agent of Record (Employee Benefits & Insurance)

Release Date: April 13, 2026

SERCO of Texas, Inc. (SERCO) is seeking qualified firms to provide Agent of Record services for employee benefits and insurance programs. This includes support for health, dental, vision, life, disability, and supplemental benefit plans. The selected firm will assist with plan design, market analysis, renewals, implementation, and ongoing servicing of employee benefits for approximately 360–370 employees.

Questions & Answers

1. Which PEO are you currently using?

SERCO currently partners with G&A Partners.

a) **Are you using the PEO for all HR functions (payroll, 401k, HR compliance, etc.)?**

The PEO supports payroll and HR compliance functions.

2. What is causing the RFQ request?

The current contract is ending, and SERCO is issuing a new RFQ to test the market.

a) **Are these procurements completed every year or driven by changing requirements?**

These procurements are typically conducted every four (4) years.

b) **Are there any specific drivers (renewal increases, service issues, staffing changes, etc.)?**

The increase in staff, including management, has contributed to the need to re-evaluate services.

3. What insurance plans are currently in place?

Current plans include:

- Health insurance
- Wellness plan
- Dental insurance
- Vision insurance
- Life insurance
- Accidental Death and Dismemberment (AD&D)
- Short- and long-term disability
- Supplemental plans (accident, cancer, critical illness, hospitalization, specific event)

- Term life and whole life
- Flexible Spending Account (FSA)
- Employer-sponsored retirement plan (e.g., 401(k))

4. What are you hoping to gain from a new agent of record?

SERCO is testing the market to identify the best available agent and determine what additional value and services can be provided to employees.

5. How are responsibilities currently split between the PEO and broker?

Responsibilities are coordinated with the PEO.

6. When issues arise (claims, billing, employee questions), who manages them?

Typically, the broker and SERCO manage these issues, with the PEO involved as needed.

7. How would you describe the current level of service?

Response time, proactiveness, industry knowledge, planning, and organization are key factors in evaluating service levels.

8. What are three (3) key requirements for the next Agent of Record?

- Minimum of five (5) years of demonstrated experience
- Strong record of integrity and ethical practices
- Ability to deliver high-quality services as proposed

9. What does the decision-making process look like? Who is involved?

All proposals will be evaluated by SERCO's internal evaluation team in accordance with the criteria outlined in the RFQ. Respondents must achieve a minimum score of 70 points to be considered. Following evaluation, top-ranked respondents may be recommended to management for final consideration and selection.

10. Can you describe the previous three (3) years of renewals (cost increases, carrier changes, AOR changes)?

Renewals have followed standard industry trends.