



APPENDIX B

EVALUATION PROCEDURE

SELECTION/EVALUATION PROCESS

The evaluation consists of a 100-point scoring system based on the “Evaluation Criteria”

- A) Evaluation Committee selected by Hidalgo County Commissioners’ Court, Elected Official or User Department (Budget and Management-Employee Benefits Division) will review, score and evaluate the Request for Proposal (RFP’s) received.

- B) Proposals will be carefully evaluated for cost effectiveness, for coverage provisions, and for compliance with the coverage and servicing criteria contained in the specifications. The agreement will be awarded to the responsible vendor who submits a superior but economical proposal based on the relative importance in the best interest of Hidalgo County.

After the RFP’s have been reviewed, scored and evaluated, a grid will be presented to Commissioners’ Court for the purposes of ranking for recommendation. Thereafter Hidalgo County Commissioners’ Court will rank and /or award the proposals.

EVALUATION FORM
Hidalgo County
"Section 125-Voluntary Insurance Products"
RFP No.2021-150-06-28-ABV

SELECTION CRITERIA	Maximum Points breakdown	SCORE
1) VENDOR QUALIFICATIONS	(maximum points- 30)	
➤ Experience in industry	0-10	
➤ References	0-10	
➤ Proof of financial stability	0-10	
Comments/Rationale for points:	TOTAL	
2) INSURANCE BENEFIT	(maximum points -40)	
➤ Contents and display of respondent's proposal	0-10	
➤ Initial proposed price	0-10	
➤ Level of commitment to deliver goods and services	0-10	
➤ Competitive Benefits	0-10	
COMMENTS/RATIONALE FOR POINTS:	TOTAL:	
3) CAPACITY TO PERFORM SERVICES AS OUTLINED ON THE RFP	(maximum points-30)	
➤ Level of commitment to servicing the account	0-10	
➤ Staffing capabilities including local service representation	0-10	
➤ Willingness to integrate product onto the County's enrollment system	0-10	
	TOTAL:	
COMMENTS/RATIONALE FOR POINTS:		
TOTAL SCORE		

Provider: _____

Evaluator: _____ Dept. _____

Comments: _____

SELECTION CRITERIA SUMMARY

I) VENDOR QUALIFICATIONS (0-30)

- 1) **EXPERIENCE IN INDUSTRY (0-10)**
 - a) Reputation of the Proposer and of the Proposer's goods and services (0-3)
 - b) Demonstration of verifiable experience and service performance provided to similar accounts, similar complexity, and size of Hidalgo County or larger (0-5)
 - c) Consider number of lawsuits and nature thereof, if applicable (0-2)
- 2) **REFERENCES (0-10)**
 - a) The nature of the references of other public entity clients concerning the Proposer (0-2)
 - b) Experience with other counties, similar size to Hidalgo County, in the state of Texas (0-2)
 - c) References fully provided as requested by the RFP? (0-6)
- 3) **PROOF OF FINANCIAL STABILITY (0-10)**
 - a) Respondent's financial condition and operational strength; (AM Best) (0-4)
 - b) Current financial statement provided (0-3)
 - c) Independent audited financial statements provided (0-3)

II) INSURANCE BENEFIT (0-40)

- 1) **CONTENT AND DISPLAY OF INSURANCE PROPOSAL (0-10)**
 - a) Did respondent provide essential and fundamental documents required? (0-2)
 - b) Was proposal submitted neatly and labeled for easy access? (0-2)
 - c) Were summary's and worksheets submitted as required? (0-3)
 - d) Did introduction letter contain all information required? (0-3)
- 2) **INITIAL PROPOSED PRICE (0-10)**
 - a) Are rates per product proposed guaranteed for 3 years (0-10)
- 3) **LEVEL OF COMMITMENT TO DELIVER GOODS AND SERVICES (0-10)**
 - a) Ability and willingness of respondent to deliver services as per RFP:
 - *Benefit paid as agreed (0-5)*
 - *Turnaround time to process and pay claims timely (each vendor has own timeline) (0-3)*
 - *Level of quality of detailed proposal including understanding the scope of services (0-2)*
- 4) **COMPETITIVE BENEFITS (0-10)**
 - a) Respondents proposed benefits are equal to current county benefits (0-4)
 - b) Respondents proposed benefits are better than current county benefits (0-6)

III) CAPACITY TO PERFORM SERVICES AS OUTLINED ON THE RFP (0-30)

- 1) **LEVEL OF COMMITMENT TO SERVICING THE ACCOUNT (0-10)**
 - a) Frequency of Vendor Representatives (local and main office) reach out to (0-5)
Hidalgo County Employee Benefits Staff (virtual or physical)
 - b) Willing to provide reports as required by Employee Benefits Staff; (0-5)
Examples:
 - *Reports to include Social Security #'s for all members*
 - *Overage dependents reports provided at least 2-3 months prior to cancelation of dependents*
- 2) **STAFFING CAPABILITIES INCLUDING LOCAL SERVICE REPRESENTATION (0-10)**
 - a) Bilingual accommodations (0-5)
 - b) Online Customer Service Support (0-2)
 - c) Local Representatives willing to visit with employee's who need assistance such as filing a claim, questions about their benefits, pay out limits, etc. (0-3)
- 3) **WILLINGNESS TO INTEGRATE PRODUCT ONTO THE COUNTY'S ENROLLMENT SYSTEM (0-10)**
 - a) Vendor agrees to integrate products onto the county's enrollment system (no exceptions) (0-3)
 - b) Vendor agrees to offset cost of maintaining enrollment system (0-2)
 - c) Vendor agrees to weekly electronic feeds (0-5)