Williamson County Evaluation Score Sheet

Risk Policies

RFP 1606-096

Wednesday, August 10, 2016 at 9:30AM

Minimum Requirements must be passed in order to be considered for scoring

Vendors	Texas Association of Counties	Carroll - Hartford	Wells Fargo – Gemini	RHSB – Travelers
Minimum Requirements	Pass	Pass	Pass	Pass
Respondents must include the carrier quotes and specimen policies including the endorsements that will be attached to the policy.	X	X	X	X
Respondents must indicate whether the quotations are subject to all lines being bound or if some lines of coverage can be purchased individually.	X	X	X	X
The specifications must be completed in full for all lines that are being quoted and all variances to the specifications must be explained in detail.	X	X	X	X
Self-Insurance Pools must complete and provide the requested information in the 'Self-Insurance Pools and Cooperatives' section.	X	X	X	X
Agents must be licensed to conduct business in the State of Texas and provide a copy of the license.	X	X	X	X
Agents must provide a certificate evidencing $1,000,000 Per Occurrence for Errors and Omissions Insurance	X	X	X	X
A.M. Best ratings must be provided for all standard insurance company quotes.	X	X	X	X
Respondents must complete Respondent's References. This form must be filled out by the carrier supplying three Public Entity references.	X	X	X	X
Must provide all Texas Public Entity Property & Casualty Insurance Clients, with a population size of 25,000 or greater	X	X	X	X

Williamson County Evaluation Score Sheet

Risk Policies – Property/Boiler/Inland Marine/Crime

RFP 1606-096 - continued

Graded Evaluation Factors:

After grading all 4 firms, the highest scoring firms were asked to provide a Best and Final Offer which is reflected and included below

Evaluation Criteria	Total Points	Please select a Whole Number from the list provided for each question. (Decimal scoring or updated rating scores are not permitted)	Texas Association of Counties	Carroll – Hartford	Wells Fargo – Zurich	RHSB – Travelers
1. Policy Limits	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	4	3	4	3
2. Policy Deductibles	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	4	3	2	2
3. Texas Property and Casualty Insurance Clients with a population size of25,000 or greater	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	3	3	3	3
4. Completeness and Responsiveness to RFP Specifications	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	3	3	3	3
5. Carrier References	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	3	3	3	3
6. Price (RFP Cost Score): Lowest Respondent's proposal/Respondent's proposal x 10 (points)	10	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	9.99 ($183,016)	10 ($182,978)	7.80 ($234,508)	7.25 ($252,486)
Total before BAFO	35		26.99	25	22.80	21.25
Best and Final was requested from 2 highest scoring vendors			10 ($183,016)	9.95 ($183,953)		
Total after BAFO	35		27	24.95		

Williamson County Evaluation Score Sheet

Risk Policies – GL/Cyber/LEL/POL/Auto

RFP 1606-096 - continued

Graded Evaluation Factors

Evaluation Criteria	Total Points	Please select a Whole Number from the list provided for each question. (Decimal scoring or unlisted rating scores are not permitted)	Texas Association of Counties	Carroll	Wells Fargo – Gemini	RHSB – Travelers
1. Policy Limits	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	4	N/A	2	1
2. Policy Deductibles	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	4	N/A	1	1
3. Texas Property and Casualty Insurance Clients with a population size of25,000 or greater	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	3	N/A	3	3
4. Completeness and Responsiveness to RFP Specifications	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	3	N/A	3	3
5. Carrier References	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	3	N/A	3	3
6. Price (RFP Cost Score): Lowest Respondent's proposal/Respondent's proposal x 10 (points)	10	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	6.26 ($572,015)	N/A	10 ($358,093)	7.82 ($457,755)
Total	35		23.26	N/A	22	18.82

Williamson County Evaluation Score Sheet

Risk Policies – GL/Cyber/LEL/POL/Auto

RFP 1606-096 – **continued**

Voting Committee Members:

Tara Raymore (Chair)

Holly Jung

Heather Kirkwood

John Sneed

Non-Voting Committee Members:

Ben Odom or representative (paid Consultant)

Kerstin Hancock (Purchasing)