

Williamson County Evaluation Score Sheet

Health Related Benefits Broker and Consultant, RFP 1604-069

Monday, June 27, 2016 at 2:00PM – Determining Minimum Requirements (Minimum Requirements must be passed in order to be scored)

Vendors	Gallagher	Crystal &Company	Holmes, Murphy & Associates	McGriff, Seibels & Williams
Minimum Requirements	Pass	Pass	Pass	Pass
Be affiliated with a legal business authorized to do business in the State of Texas. All required permits and licenses must be in full force at the time Respondent's Proposal is submitted.	X	X	X	X
Have key personnel with experience providing employee benefits consulting to Texas Governmental entities	X	X	X	X
Have public sector clients that provide self-funded health insurance programs with experience with plan designs and setting premiums	X	X	X	X
Have prior experience in all aspects of the services described in this RFP.	X	X	X	X
Have prior experience with customers similar to or with relevance in the size, complexity and scope of this RFP	X	X	X	X
Must provide list of staff who will be assigned to service the County's account.	X	X	X	X

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Monday, June 27, 2016 at 2:00PM - Scoring of 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)	Gallagher	Crystal & Company	Holmes, Murphy & Associates	McGriff, Seibels & Williams
Experience of Team	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
Technical Expertise	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	3	3	4	3
Accessibility for Team	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	3	2	2	2
Local Presence/Ability to attend meetings	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	4	2	2	2
Proactive approach to support Williamson County	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
Past Experience/Demonstrated success with like scope, size & complexity	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	3	2	3	3
Ability to ensure legal compliance	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	3	3	4	3
Skill/Experience to attract competitive vendors	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets 1 = does not meet requirements	2	2	3	2

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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)	Gallagher	Crystal & Company	Holmes, Murphy & Associates	McGriff, Seibels & Williams
Price (RFP Cost Score): Lowest Respondent's proposal/Respondent's Proposal x 16 (points)	16	16 (maximum - weighted at 40% of the total maximum points of criteria - 40x40% = 16 max points)	11.63 (\$110,000 annual Consultant Fee)	12.92 (\$99,000 annual Consultant Fee)	16 (\$80,000 annual Consultant Fee)	12.80 (\$100,000 annual Consultant Fee)
Total	56		35.63	32.92	40	33.80

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Monday, July 18, 2016 2:00PM – 5PM - Interviews and Final Scoring

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)	Gallagher	Crystal & Company	Holmes, Murphy & Associates	McGriff, Seibels & Williams
Smooth Transfer and new client implementation	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	3	3	5	5
Response to key deliverables	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	3	3	4	4
Correction of failure	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
Business Practices, notice prior to meetings,	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	3	4	4	5
Implementation of Actuarial Evaluation into current plan	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	2	3	5	4
Process to achievement of best benefit offerings	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	3	3	3	4
Innovation	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets requirements 1 = does not meet requirements	3	4	4	3
Response to the question "Present and Former Client references "	5	5 = significantly exceeds requirements 4 = marginally exceeds requirements 3 = meets requirements 2 = marginally meets 1 = does not meet requirements	3	5	5	5
BAFO price (BAFO Cost Score): Lowest Respondent's proposal/Respondent's Proposal x 16 (points)	16	16 (maximum - weighted at 40% of the total maximum points of criteria - 40x40% = 16 max points)	11.63 (\$110,000 BAFO annual Consultant Fee)	15.05 (\$85,000 BAFO average annual Consultant Fee)	16 (\$80,000 BAFO annual Consultant Fee)	12.80 (\$100,000 BAFO annual Consultant Fee)
Total	56		34.63	43.05	49	45.80

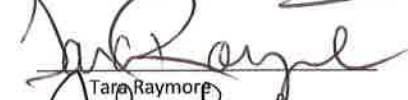
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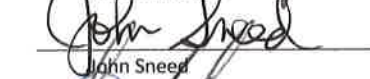
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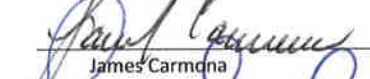
Signatures of Evaluation Committee

Voting Committee Members:


Shelley Loughrey (Chair)


Tara Raymore


John Sneed


James Carmona


Shannon Francis

Non-Voting Committee Members:


Kerstin Hancock

Evaluation Summary for RFP# 1604-069 Health Benefit Broker and Consultant

Four proposal submittals were received.

The initial evaluation consisted of examining the minimum requirements set forth in the RFP. All four proposers passed all mandatory criteria.

The second round of evaluations consisted of scoring the preferred criteria per the RFP specifications including the annual cost. The Evaluation Committee invited all four firms for a presentation/interview. All companies were also asked to provide their Best and Final Offer. All companies were scored based upon additional criteria including the BAFOs submitted.

The Evaluation Committee selected Holmes, Murphy & Associates, the highest scoring proposer to be recommended for contract award. The cost proposal was the lowest received and is within budget.