

**Williamson County Evaluation Score Sheet**  
**Employee Assistance Program, RFP 1604-070**

**Tuesday, June 28, 2016 at 3:30PM – Determining Minimum Requirements (must be passed in order to be scored)**

| Vendors   | Aetna  | Alliance Work Partners (WAP) | Deer Oaks EAP Services | Interface EAP |
|---|--|------------------------------|------------------------|---------------|
| Minimum Requirements  | Pass   | Pass                         | Pass                   | Pass          |
| 6 sessions per employee, dependent/per incident/per calendar year                         | X  | X                            | X                      | X             |
| Training for employees and supervisors  | X  | X                            | X                      | X             |
| Reports upon request  | X  | X                            | X                      | X             |
| Toll free number for customer service   | X  | X                            | X                      | X             |
| 24-Hour support   | X  | X                            | X                      | X             |
| List of professional and academic experience of general staff provided                    | X  | X                            | X                      | X             |
| List of all team members assigned to Williamson County provided                           | X  | X                            | X                      | X             |
| List of other employees assigned to account (if applicable)                               | X  | X                            | X                      | X             |
| HIPAA and 42 CFR client confidentiality   | X  | X                            | X                      | X             |
| List of local providers before Oct. 1, 2016   | X  | X                            | X                      | X             |
| List of companies that utilize your services and contacts provided                        | X  | X                            | X                      | X             |
| List of companies that terminated service within 12 months or statement if not applicable | Not provided; will not move into second evaluation | X                            | X                      | X             |

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**Tuesday, June 28, 2016 at 3:30PM – Scoring of Graded Evaluation Factors**

| <b>Evaluation Criteria</b>   | <b>Total Points</b> | <b>Please select a Whole Number from the list provided for each question. (Decimal scoring or unlisted rating scores are not permitted)</b>                                    | <b>Alliance Work Partners (WAP)</b>     | <b>Deer Oaks EAP Services</b>            | <b>Interface EAP</b>               |
|--|---------------------|--|---|--|------------------------------------|
| Experience of Team   | 5                   | 5 = significantly exceeds requirements<br>4 = marginally exceeds requirements<br>3 = meets requirements<br>2 = marginally meets requirements<br>1 = does not meet requirements | 3                                       | 5  | 3                                  |
| Technical Expertise  | 5                   | 5 = significantly exceeds requirements<br>4 = marginally exceeds requirements<br>3 = meets requirements<br>2 = marginally meets requirements<br>1 = does not meet requirements | 3                                       | 4  | 2                                  |
| Accessibility for Team   | 5                   | 5 = significantly exceeds requirements<br>4 = marginally exceeds requirements<br>3 = meets requirements<br>2 = marginally meets requirements<br>1 = does not meet requirements | 3                                       | 4  | 2                                  |
| Web/24 hour support  | 5                   | 5 = significantly exceeds requirements<br>4 = marginally exceeds requirements<br>3 = meets requirements<br>2 = marginally meets requirements<br>1 = does not meet requirements | 2                                       | 4  | 2                                  |
| Assurance for Confidentiality  | 5                   | 5 = significantly exceeds requirements<br>4 = marginally exceeds requirements<br>3 = meets requirements<br>2 = marginally meets requirements<br>1 = does not meet requirements | 3                                       | 3  | 3                                  |
| Local Presence/Ability to attend regular meetings  | 5                   | 5 = significantly exceeds requirements<br>4 = marginally exceeds requirements<br>3 = meets requirements<br>2 = marginally meets requirements<br>1 = does not meet requirements | 3                                       | 3  | 2                                  |
| Proactive Proposed Approach to support Williamson County                                 | 5                   | 5 = significantly exceeds requirements<br>4 = marginally exceeds requirements<br>3 = meets requirements<br>2 = marginally meets requirements<br>1 = does not meet requirements | 3                                       | 3  | 3                                  |
| Demonstrated Success in past projects with like scope and complexity                     | 5                   | 5 = significantly exceeds requirements<br>4 = marginally exceeds requirements<br>3 = meets requirements<br>2 = marginally meets<br>1 = does not meet requirements              | 2                                       | 2  | 2                                  |
| 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)  | 8.88<br>(\$47,250 6 visits annual cost) | 10.75<br>(\$39,060 6 visits annual cost) | 16 (\$26,250 6 visits annual cost) |
| <b>Total</b>   | <b>56</b>           |  | <b>30.88</b>                            | <b>38.75</b>                             | <b>35</b>                          |

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**Monday, July 25, 2016 2:00PM – 5:00PM - Interviews and final scoring**

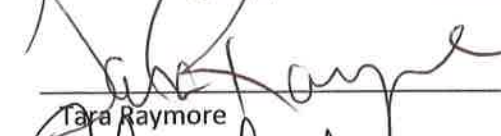
| <b>Evaluation Criteria</b>  | <b>Total Points</b> | Please select a Whole Number from the list provided for each question. (Decimal scoring or unlisted rating scores are not permitted)   | <b>Deer Oaks EAP Services</b>              | <b>Interface EAP</b>                    |
|---|---------------------|--|--|---|
| Remote Assistance   | 5                   | 5 = significantly exceeds requirements<br>4 = marginally exceeds requirements<br>3 = meets requirements<br>2 = marginally meets requirements<br>1 = does not meet requirements | 5  | 3                                       |
| Response to a major crisis  | 5                   | 5 = significantly exceeds requirements<br>4 = marginally exceeds requirements<br>3 = meets requirements<br>2 = marginally meets requirements<br>1 = does not meet requirements | 4  | 2                                       |
| Manager Referrals Process   | 5                   | 5 = significantly exceeds requirements<br>4 = marginally exceeds requirements<br>3 = meets requirements<br>2 = marginally meets requirements<br>1 = does not meet requirements | 4  | 2                                       |
| Turn-around time evaluation documentation   | 5                   | 5 = significantly exceeds requirements<br>4 = marginally exceeds requirements<br>3 = meets requirements<br>2 = marginally meets requirements<br>1 = does not meet requirements | 4  | 2                                       |
| Behavioral Modification Programs  | 5                   | 5 = significantly exceeds requirements<br>4 = marginally exceeds requirements<br>3 = meets requirements<br>2 = marginally meets requirements<br>1 = does not meet requirements | 4  | 3                                       |
| Training offered for County employees   | 5                   | 5 = significantly exceeds requirements<br>4 = marginally exceeds requirements<br>3 = meets requirements<br>2 = marginally meets requirements<br>1 = does not meet requirements | 3  | 3                                       |
| Forms availability  | 5                   | 5 = significantly exceeds requirements<br>4 = marginally exceeds requirements<br>3 = meets requirements<br>2 = marginally meets requirements<br>1 = does not meet requirements | 4  | 3                                       |
| 24 hour phone line  | 5                   | 5 = significantly exceeds requirements<br>4 = marginally exceeds requirements<br>3 = meets requirements<br>2 = marginally meets requirements<br>1 = does not meet requirements | 4  | 2                                       |
| Marketing of products/key meetings  | 5                   | 5 = significantly exceeds requirements<br>4 = marginally exceeds requirements<br>3 = meets requirements<br>2 = marginally meets requirements<br>1 = does not meet requirements | 4  | 3                                       |
| BAFO price (BAFO Cost Score): Lowest Respondent's proposal/ Respondent's Proposal x 18 (points) | 18                  | 16 (maximum - weighted at 40% of the total maximum points of criteria - $40 \times 40\% = 16$ max points)  | 12.16 (\$38,850 6-visits annual cost BAFO) | 18 (\$26,250 6-visits annual cost BAFO) |
| <b>Total</b>  | <b>58</b>           |  | <b>48.16</b>                               | <b>41</b>                               |

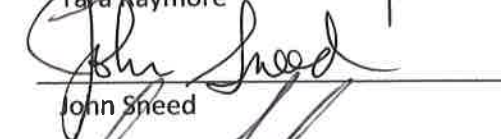
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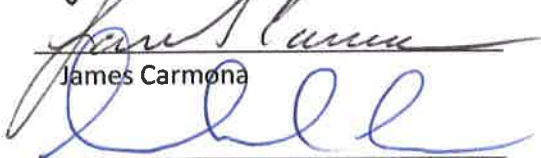
**Signatures of Committee Members**

**Voting Committee Members:**

  
Shelley Loughrey (Chair)

  
Tara Raymore

  
John Sneed

  
James Carmona

  
Shannon Francis

**Non-Voting Committee Members:**

  
Kerstin Hancock

**Evaluation Summary for RFP# 1604-070 Employee Assistance Program:**

Four proposal submittals were received.

The initial evaluation consisted of examining the minimum requirements set forth in the RFP. Only three proposers passed all criteria.

The second round of evaluations consisted of scoring the preferred criteria per the RFP specifications including the PEPM cost. The Evaluation Committee selected the two highest scoring proposers, Deer Oaks and Interface EAP for a presentation/interview. Both companies were also asked to provide their Best and Final Offer. Both Companies were scored based upon additional criteria including the BAFOs submitted.

The Evaluation Committee selected Deer Oaks, the highest scoring proposer to be recommended for contract award. The cost proposal was within budget.