



Williamson County Benefits Committee

June 13, 2024

Evaluation Summary – 24RFP28 Financial Wellbeing Services

After reviewing and evaluating the ten proposals that were submitted the review committee selected the top four for a short thirty-minute presentation to review the vendors system and each vendors approach if selected on implementation and how they would serve the County.

The final selection was The Lampo Group, dba Smart Dollar due to their knowledge and experience in the industry, the systems that they have developed as well as the results they have achieved with other organizations like our size of the County and much larger. They presented a well thought out implementation plan if they are selected as the top vendor. The proposal submitted fits within our budget.

We met with the Benefits Committee on June 4, 2024, and they have approved our recommendation to be submitted to the Commissioners Court for final approval.