

ITEM #7
2011-016 Proposal Tab
Finance
3/17/11

Tabulation of Proposals*

Purchasing Office Solicitation No.:	2011-016 (Group employee insurance benefits consulting services)
Notice to Proposers published in the <i>Williamson Herald</i> on:	2/3/11
Number of vendors that were notified of / that responded to this request for proposals:	28 / 8
Date and time proposals due and publicly opened:	2/17/11 2:00 PM
Present at opening of proposals:	Maria Iarossi of Gallagher Benefit Services; and Tiffany Wilkins and Brian Wilcox of the City of Franklin Purchasing Office
Proposal evaluation team:	For qualatative (non-fee) selection criteria: Tammie Pitts, Candace Connell and (as a non-scoring participant) Shirley Harmon, all of the Human Resources Department; Mike Lowe of the Finance Department; and Eric Stuckey of the Administration Department For quantitative (fee) selection criteria: Brian Wilcox of the Purchasing Office
Target meeting of BOMA at which recommendation will be considered:	3/8/11

Proposals received from:	Proposal No.:	Description of proposal:	Does the proposal take exceptions to the City's requirements?	Total quoted proposed fee for initial (12 mo.) term of service:	Proposal Evaluation Team consensus score (out of 100 total points possible):	Payment terms:	Proposal is valid and may be accepted through:
Benalytics Consulting Group, LLC 1290 Kennestone Circle, Suite A201 Marietta, GA 30066 Charles Atkinson, Principal 770/420-0525	1 of 1	Group employee insurance benefits consulting services	Proposer takes no exceptions; however, City notes proposer did not, by deadline, acknowledge Addendum No. 1 and did not submit one of the required forms	\$99,000.00	69.0	net 30 days from date of invoice	06/01/11
The Drury Group, Inc. 130 9th Ave. South, Suite 100 Franklin, TN 37064 Charles Pareigis, President 615/628-3382	1 of 3	Consulting and RFP services only	Proposer lists one disclosure	\$25,000.00	76.0	net 30 days from date of invoice	04/30/11
	2 of 3	Same as 1 plus account mgmt		\$80,000.00	70.3		
	3 of 3	Same as 2 plus benefit communication and online enrollment system		\$120,000.00	74.0		
Employee Security Planning, Inc. 277 Wilson Pike Circle, Suite 203 Brentwood, TN 37027 Bob Shupe, President 615/661-6223	1 of 1	Group employee insurance benefits consulting services	Proposer lists two disclosures	\$9,400.00	57.0	net 30 days from date of invoice	04/30/11
Gallagher Benefit Services, Inc. 5205 Maryland Way, Suite 300 Brentwood, TN 37027 Maria Iarossi, VP, Client Development 615/324-1176	1 of 1	Group employee insurance benefits consulting services	Proposer takes no exceptions; however, City notes proposer did not submit by deadline one of the required forms	\$42,500.00	82.0	net 30 days from date of invoice	05/30/11
Mark III Brokerage, Inc. 211 Greenwich Rd. Charlotte, NC 28211 Mark Browder, VP 704/365-4280, ext. 204	1 of 1	Group employee insurance benefits consulting services	Proposer takes no exceptions	\$24,732.00	83.0	Not indicated	05/15/11

*Shaded proposal is the proposal found by the proposal evaluation team to best meets the needs of the City

Tabulation of Proposals*

Purchasing Office Solicitation No.:	2011-016 (Group employee insurance benefits consulting services)
Notice to Proposers published in the Williamson Herald on:	2/3/11
Number of vendors that were notified of / that responded to this request for proposals:	28 / 8
Date and time proposals due and publicly opened:	2/17/11 2:00 PM
Present at opening of proposals:	Maria Iarossi of Gallagher Benefit Services; and Tiffany Wilkins and Brian Wilcox of the City of Franklin Purchasing Office
Proposal evaluation team:	For qualatative (non-fee) selection criteria: Tammie Pitts, Candace Connell and (as a non-scoring participant) Shirley Harmon, all of the Human Resources Department; Mike Lowe of the Finance Department; and Eric Stuckey of the Administration Department For quantitative (fee) selection criteria: Brian Wilcox of the Purchasing Office
Target meeting of BOMA at which recommendation will be considered:	3/8/11

Proposals received from:	Proposal No.:	Description of proposal:	Does the proposal take exceptions to the City's requirements?	Total quoted proposed fee for initial (12 mo.) term of service:	Proposal Evaluation Team consensus score (out of 100 total points possible):	Payment terms:	Proposal is valid and may be accepted through:
Pancoast Benefits 4205 Hillsboro Rd., Suite 120 Nashville, TN 37215 Tom Mitchell, VP, Sales 615/292-3400	1 of 1	Group employee insurance benefits consulting services	Proposer takes no exceptions; however, City notes proposer did not submit by deadline any of the required forms	\$249,600.00	19.0	net 30 days from date of invoice	04/30/11
Sherrill Morgan 525 W. 5th St., Suite 310 Covington, KY 41011 Mark Morgan, President 859/291-6600	1 of 1	Group employee insurance benefits consulting services	Proposer takes no exceptions	\$30,000.00	93.0	net 30 days from date of invoice	07/01/12
Wells Fargo Insurance Services 950 Breckenridge Lane, Suite 50 Louisville, KY 40207 Blaine McLaughlin, Account Executive 502/326-4071	1 of 1	Group employee insurance benefits consulting services	Proposer did not submit by deadline some of the required forms	\$47,500.00	64.0	net 30 days from date of invoice	04/30/11

*Shaded proposal is the proposal found by the proposal evaluation team to best meets the needs of the City

Scoring of Proposals (after conferring)

	Fees Proposed				Fee Points (35 pts. possible)				Team Consensus				
	Year 1	Year 2	Year 3		Year 1	Year 2	Year 3	Average	Qualifications and ability to carry out Scope of Services (40 pts. possible)	Work plan / Technical Approach (15 pts. possible)	Completeness of proposal and adherence to RFP instructions (10 pts. possible)	Total, excluding Fee Points (65 total pts. possible)	Total, including Fee Points (100 total pts. possible)
Benalytics	\$99,000.00	\$99,000.00	\$99,000.00		22	22	22	22.0	30	12	5	47	69.0
The Drury Group, Opt. #1	\$25,000.00	\$25,000.00	\$25,000.00		32	32	32	32.0	36	5	3	44	76.0
The Drury Group, Opt. #2	\$80,000.00	\$65,000.00	\$65,000.00		25	27	27	26.3	36	5	3	44	70.3
The Drury Group, Opt. #3	\$120,000.00	\$120,000.00	\$120,000.00		19	19	19	19.0	36	13	6	55	74.0
Employee Security Planning	\$9,400.00	\$9,400.00	\$9,400.00		34	34	34	34.0	10	5	8	23	57.0
Gallagher	\$42,500.00	\$40,000.00	\$40,000.00		30	30	30	30.0	32	13	7	52	82.0
Mark III	\$24,732.00	\$24,732.00	\$24,732.00		32	32	32	32.0	35	13	3	51	83.0
Pancoast	\$249,600.00	\$249,600.00	\$249,600.00		2	2	2	2.0	12	5	0	17	19.0
Sherrill Morgan	\$30,000.00	\$31,500.00	\$33,000.00		31	31	31	31.0	38	14	10	62	93.0
Wells Fargo	\$47,500.00	\$47,500.00	\$47,500.00		29	29	29	29.0	26	7	2	35	64.0