

Scope of Services Review
Benefits Consulting Services RFP

	Retiree Insurance	Insurance RFP	Healthcare Reform/Legislation	Long-term Goals	Communication Materials	Wellness	Public Sector Experience	Deficiencies/Concerns/Misc.	Total Points Awarded	Cost
Sherrill Morgan	Addresses - management of Pre-65 retiree insurance programs and liability, including GASB liability	Detailed	Yes	Strong emphasis on long-term goals	Good communication materials	Wellness incorporated with ROI tracking	75 public sector clients	1. Detailed RFP summary, but sample RFP analysis limited.	93.00	\$30,000.00
	Included sample of recommendation to another client						Strong presence in TN cities Conducts annual TPMA Benefits Survey	2. Attorney and CPA on staff.		
Mark III Brokerage	Not addressed	Detailed	Yes	Yes	Good communication materials	Detailed wellness approach	110 public sector clients	1. Fixed flat fee not offered as was required. Unclear if PMPM charge is based on participating, FT, or all employees.	83.00	\$24,732.00
							Includes TN cities	2. Request to be exclusive voluntary benefits provider and accept commissions. This is in conflict with RFP.		
								3. Contract included states for "broker services" and prohibits competing insurance products. This is in conflict with the RFP.		
								4. Retiree insurance not mentioned.		
								5. On-site clinic and pharmacy experience, online enrollment.		
Gallagher Benefit Services	Addressed but limited	Detailed	Yes	Yes	Great communication material	Limited	17 public sector clients-Nashville TN cities or counties not listed as references	1. Failed to return Standard Terms and Conditions. 2. Retiree insurance mentioned but limited.	82.00	\$42,500.00

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							Acknowledgement of different challenges in public sector	3. COF previously found their benefits consulting unsatisfactory. Same staff listed in proposal.		
Drury Group, Option 1	Not addressed	Detailed	Yes	Not included in option	Not included in option	Not included in option	Six public sector clients	1. RFP assistance only in this option. 2. Retiree insurance not mentioned.	76.00	\$25,000.00
Drury Group, Option 2	Not addressed	Detailed	Yes	Yes	Not included in option	Not included in option	Six public sector clients	1. Option limited. 2. Retiree insurance not mentioned. 3. Employee dedicated solely to COF. Office there or City Hall. Access to HR help desk.	70.30	\$80,000.00
Drury Group, Option 3	Not addressed	Detailed	Yes	Yes	Great communication materials	Long-term wellness strategy development	Six public sector clients	1. Retiree insurance not mentioned. 2. Broker services were not requested in Scope of Services outlined in RFP. While flat fee quoted, the Deviations to Specifications & Overview section stated "concept of a single full service broker (Option 3)". 3. Employee dedicated solely to COF. Office there or City Hall. Access to software, online enrollment.	74.00	\$120,000.00
Benalytics Consulting	Addressed	Detailed	Yes	Yes	Unable to tell much about the materials in photos	Limited	Georgia experience, but limited Tennessee	1. Did not include Terms and Conditions.	69.00	\$99,000.00

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								2. Did not include sample report that was referred to in proposal. 3. Currently no educational material/updates provided to clients. 4. Detailed response to scope/work plan and qualifications.		
Wells Fargo Insurance	Not addressed	Yes	Yes	Yes	Good communication materials	Limited	Four public sector listed in references, but unclear of total represented.	1. Did not return most required forms. 2. Request ability to collect commissions. This is in conflict with RFP. 3. RFP response unfocused. Looks more like marketing products. Unclear what is actually included in fee. 4. Retiree insurance not mentioned.	64.00	\$47,500.00
Employee Security Planning	Not addressed	Detailed	Yes	Limited	Education materials provided at extra cost The Bitter Pill pamphlet had a political slant.	Limited	35 public sector clients	1. Inability to work with BCBST prohibits them from carrying out the scope of services. 2. The Bitter Pill pamphlet had a political slant. 3. Retiree insurance not mentioned.	57.00	\$9,400.00
Pancoast Benefits	Not addressed	Mentioned, but not detailed	Yes	Limited	Yes	Limited	Broker for State Dental only listed	1. Did not return required forms or comply with requirements. 2. Retiree insurance not mentioned. 3. Proposal very limited.	19.00	\$249,600.00