ITEM #10 2011-016 Proposal Tab BOMA 3/22/11

City of Franklin, Tennessee <u>Tabulation of Proposals</u>*

			or repusais				
Purchasing Office Solicitation No		Group employ	yee insurance bene	efits consulting	services)		
Notice to Proposers published in th Williamson Herald or							
Number of vendors that were notified of	. ,						
that responded to this request for proposal							
Date and time proposals due and publicly opene		00 PM					
	Maria Iar		er Benefit Service	es; and Tiffany	Wilkins and I	Brian Wilcox	of the
Present at opening of proposal	City of Fra	anklin Purcha					
) selection criteria				
Proposal evaluation tean			rley Harmon, all o				ke Lowe of
•			; and Eric Stuckey lection criteria: B	·			
Target meeting of BOMA at whic	h	itative (iee) sei	ection criteria. B	TIAII WIICOX OI	the r urchasin	ig Office	
recommendation will be considered	1.5/8/11			·			
		T				T	
					Proposal Evaluation		
					Team		Proposal
			Does the	Total quoted	consensus		is valid
			proposal take	proposed fee	score (out of		and may
			exceptions to the	for initial (12	100 total		be
	Proposal	Description	City's	mo.) term of	points	Payment	accepted
Proposals received from:	No.:	of proposal:	requirements?	service:	possible):	terms:	through:
		Group	Proposer takes no				
Benalytics Consulting Group, LLC		employee	exceptions; however,			. 20 1	
1290 Kennestone Circle, Suite A201	1 of 1	insurance	City notes proposer did not, by deadline,	\$99,000.00	69.0	net 30 days from date	06/01/11
Marietta, GA 30066 Charles Atkinson, Principal	1 01 1	benefits	acknowledge Addendum No. 1 and did not submit	\$99,000.00	09.0	of invoice	00/01/11
770/420-0525		consulting	one of the required			OI IIIVOICE	
7107120 0323		services	forms				
		Consulting and RFP					
The Drury Group, Inc.	1 of 3	services only		\$25,000.00	76.0		
130 9th Ave. South, Suite 100	2 of 3	Same as 1 plus	Proposer lists one	\$80,000.00	70.3	net 30 days	
Franklin, TN 37064	2 01 3	Same as 2 plus benefit	disclosure	\$60,000.00	70.5	from date	04/30/11
Charles Pareigis, President 615/628-3382	3 of 3	communication and	:	\$120,000.00	74.0	of invoice	
013/028-3382	3 01 3	online enrollment system		\$120,000.00	71.0		
Employee Security Planning, Inc.		Group employee	ADDITIONAL PROPERTY OF THE PRO				
277 Wilson Pike Circle, Suite 203		insurance	Proposer lists two			net 30 days	
Brentwood, TN 37027	1 of 1	benefits	disclosures	\$9,400.00	57.0	from date	04/30/11
Bob Shupe, President		consulting				of invoice	
615/661-6223		services			***		
		Group	Proposer takes no				
Gallagher Benefit Services, Inc.		employee	exceptions;				
5205 Maryland Way, Suite 300	1 - 6 1	insurance	however, City notes	¢40 500 00	02.0	net 30 days	05/20/41
Brentwood, TN 37027 Maria Iarossi, VP, Client Development	1 of 1	benefits	proposer did not submit by deadline	\$42,500.00	82.0	from date of invoice	05/30/11
615/324-1176	Managaran	consulting	one of the required			or mivoice	
		services	forms				
		Group		,			
Mark III Brokerage, Inc.		employee					
211 Greenwich Rd.	1 01	insurance	Proposer takes no	004.700.00	00.0	Not	0 = 11 = 11 :
Charlotte, NC 28211 Mark Browder, VP	1 of 1	benefits	exceptions	\$24,732.00	83.0	indicated	05/15/11
		consulting	-				
704/365-4280, ext. 204		services					

City of Franklin, Tennessee <u>Tabulation of Proposals</u>*

Purchasing Office Solicitation No.:	2011-016(Group employ	ee insurance bene	efits consulting	services)		
Notice to Proposers published in the Williamson Herald on:	2/3/11						
Number of vendors that were notified of /	28 / 8	4.00					
that responded to this request for proposals:			***************************************				
Date and time proposals due and publicly opened							
Present at opening of proposals:	City of Fra	nklin Purcha					
Proposal evaluation team:	scoring par the Financ	rticipant) Shir e Department) selection criteria ley Harmon, all o ; and Eric Stucke ection criteria: B	f the Human R y of the Admin	Resources Depa istration Depa	artment; Mil irtment	
Target meeting of BOMA at which recommendation will be considered:	3/8/11					Neg-regues a service and a	
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

Scoring of Proposals (after conferring)

		Fees Proposed		Fee I	oints (3	Fee Points (35 pts. possible)	ssible)		Tea	Team Consensus	sn	
	Year 1	Year 2	Year 3	Year 1	Year 2	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.
Benalytics	\$99,000.00	\$99,000.00	\$99,000.00	22	22	22	22.0	30	12	5	47	0.69
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	\$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	\$120,000.00	19	19	19	19.0	36	13	9	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	\$24,732.00	32	32	32	32.0	35	13	3	51	83.0
Pancoast	\$249,600.00	\$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	\$47,500.00	29	29	29	29.0	26	7	2	35	64.0