

RFP-2410 Health & Welfare Broker of Record Services

Budget: \$150,000 per year for 3 Years (\$450,000)  
with 2-Year Option (\$300,000)  
11/08/22 at 10:00 AM via Teams

Evaluators: 1-Fonda, 2-Roger, 3-Roland	Gallagher Benefit Services, Inc.			Lockton-Dunning Series of Lockton Companies, LLC				McGriff Insurance Services, Inc.				
Project Relative Weight				Average Team Score				Average Team Score				Average Team Score
	E1	E2	E3	77.83	E1	E2	E3	74.75	E1	E2	E3	68.51
<b>SMWBE Participation - 35% Organizational Goal/MWBE - 30% Aspirational Goal</b>												
<b>Price - 30 pts</b>	Actual Price				Actual Price				Actual Price			
Purchase Price Calculation per "Instruction to Respondents"	\$500,000.00			10.50	\$600,000.00			8.75	\$670,000.00			7.84
<b>Respondent's (and Subconsultant's, if applicable) Reputation and Quality of Services - 35 pts</b>												
Reputation & Service Levels: Includes demonstrated experience as a whole in successful performance of comparable contracts, in both the industry and quasi-government structures - 20 pts	19.00	20.00	20.00	19.67	19.00	20.00	20.00	19.67	18.00	20.00	19.00	19.00
Professional background of primary account managers & support personnel, including professional broker qualifications, to include relevant public sector benefits management experience - 10 pts	10.00	9.00	10.00	9.67	10.00	10.00	10.00	10.00	10.00	8.00	9.00	9.00
Client references: Include specific experience with Texas political subdivisions, including major or unusual issues encountered with those clients, proposed solutions and results - 5 pts	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
<b>Total Average - Respondent's Reputation and Quality of Services</b>	34.00	34.00	35.00	34.33	34.00	35.00	35.00	34.67	33.00	33.00	33.00	33.00
<b>Benefit to PHA - 20 pts</b>												
The extent to which proposed professional services and or company(ies) are suitable to and benefit Port Houston - 15 pts	14.00	15.00	14.00	14.33	14.00	13.00	14.00	13.67	12.00	15.00	13.00	13.33
The total long-term cost to acquire the coverage and/or services - 5 pts	5.00	5.00	4.00	4.67	3.00	5.00	3.00	3.67	2.00	2.00	2.00	2.00
<b>Total Average - Performance Plan and Other Benefits</b>	19.00	20.00	18.00	19.00	17.00	18.00	17.00	17.33	14.00	17.00	15.00	15.33
<b>Overall Compliance with PHA Policies and Instructions - 15 pts</b>												
Full completion of the proposal Response form and submission of the items required by the proposal documents, including, but not limited to, all items set forth in Section C of the proposal Response form, and including addenda, if any - 5 pts	5.00	5.00	4.00	4.67	5.00	5.00	5.00	5.00	5.00	4.00	4.00	4.33
Understanding and acceptance of PORT AUTHORITY's contract requirements - 3 pts	2.00	3.00	2.00	2.33	2.00	2.00	2.00	2.00	3.00	3.00	3.00	3.00
Transparency of all fees demonstrated independence and lack of potential conflicts of interest relative to insurers - 5 pts	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	3.00	2.00	3.33
Response acceptably presented in terms of clarity, conciseness, organization, and appearance - 2 pts	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	1.00	1.67
<b>Total Average - Overall Compliance with PHA Policies and Instructions</b>	14.00	15.00	13.00	14.00	14.00	14.00	14.00	14.00	15.00	12.00	10.00	12.33
<b>TEAM AVERAGE TOTAL SCORES</b>				<b>77.83</b>				<b>74.75</b>				<b>68.51</b>

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NON-RESPONSIBLE

Evaluators: 1-Fonda, 2-Roger, 3-Roland	Alliant Insurance				USI Southwest, Inc.				Cuellar & Associates, LLC			
	Project Relative Weight			Average Team Score				Average Team Score				Average Team Score
	E1	E2	E3	53.52	E1	E2	E3	53.33	E1	E2	E3	54.67
<b>SMWBE Participation - 35% Organizational Goal/MWBE - 30% Aspirational Goal</b>												
<b>Price - 30 pts</b>	Actual Price				Actual Price				Actual Price			
Purchase Price Calculation per "Instruction to Respondents"	\$515,000.00			10.19	\$750,000.00			7.00	\$175,000.00			30.00
<b>Respondent's (and Subconsultant's, if applicable) Reputation and Quality of Services - 35 pts</b>												
Reputation & Service Levels: Includes demonstrated experience as a whole in successful performance of comparable contracts, in both the industry and quasi-government structures - 20 pts	5.00	15.00	10.00	10.00	5.00	15.00	17.00	12.33	5.00	5.00	10.00	6.67
Professional background of primary account managers & support personnel, including professional broker qualifications, to include relevant public sector benefits management experience - 10 pts	7.00	8.00	6.00	7.00	7.00	8.00	8.00	7.67	2.00	4.00	6.00	4.00
Client references: Include specific experience with Texas political subdivisions, including major or unusual issues encountered with those clients, proposed solutions and results - 5 pts	1.00	5.00	5.00	3.67	0.00	5.00	0.00	1.67	0.00	1.00	1.00	0.67
<b>Total Average - Respondent's Reputation and Quality of Services</b>	13.00	28.00	21.00	20.67	12.00	28.00	25.00	21.67	7.00	10.00	17.00	11.33
<b>Benefit to PHA - 20 pts</b>												
The extent to which proposed professional services and or company(ies) are suitable to and benefit Port Houston - 15 pts	5.00	15.00	7.00	9.00	7.00	12.00	13.00	10.67	0.00	5.00	8.00	4.33
The total long-term cost to acquire the coverage and/or services - 5 pts	4.00	4.00	4.00	4.00	1.00	1.00	1.00	1.00	0.00	5.00	5.00	3.33
<b>Total Average - Performance Plan and Other Benefits</b>	9.00	19.00	11.00	13.00	8.00	13.00	14.00	11.67	0.00	10.00	13.00	7.67
<b>Overall Compliance with PHA Policies and Instructions - 15 pts</b>												
Full completion of the proposal Response form and submission of the items required by the proposal documents, including, but not limited to, all items set forth in Section C of the proposal Response form, and including addenda, if any - 5 pts	3.00	4.00	2.00	3.00	5.00	3.00	3.00	3.67	0.00	3.00	3.00	2.00
Understanding and acceptance of PORT AUTHORITY's contract requirements - 3 pts	2.00	3.00	1.00	2.00	3.00	3.00	3.00	3.00	2.00	2.00	1.00	1.67
Transparency of all fees demonstrated independence and lack of potential conflicts of interest relative to insurers - 5 pts	4.00	3.00	3.00	3.33	5.00	4.00	4.00	4.33	0.00	1.00	2.00	1.00
Response acceptably presented in terms of clarity, conciseness, organization, and appearance - 2 pts	2.00	1.00	1.00	1.33	2.00	2.00	2.00	2.00	1.00	1.00	1.00	1.00
<b>Total Average - Overall Compliance with PHA Policies and Instructions</b>	11.00	11.00	7.00	9.67	15.00	12.00	12.00	13.00	3.00	7.00	7.00	5.67
<b>TEAM AVERAGE TOTAL SCORES</b>				53.52				53.33				54.67