

Port of Houston Authority Evaluation Form

Project: RFP-537 Employee Benefits & Consulting Services

Date: 01/02/2018 @ 9:00 AM

FINAL

Estimate: \$175,000

| | | | SELECTION CRITERIA | | | | | |
|--|-----------------|--|--------------------|------------|----------------|---|-------------|--|
| | | | 1 | 2 | 3 | 4 | | |
| Vendor | Proposal Amount | Small Business Information SB Goal SB Prime % SB Subs | Price | Respondent | Benefit to PHA | Compliance w/PHA Policies and Instructions | Total Score | Comments |
| Project Relative Weight (%) | | | 20% | 50% | 20% | 10% | 100% | |
| Lockton Companies, LLC 5847 San Felipe Street, Suite 320 Houston, TX 77057 | \$575,000 | 0 % Goal 0% SB Sub | 16 | 47 | 19 | 10 | 92 | 1. 5th lowest price (average \$115,000/year) 2. Four person Houston-based team assigned to PHA average 19 years experience; possess appropriate licenses; team assigned to max. of seven accounts Sufficient experience with public entities; 350 employees in Houston w/ 35 in benefits area; <5% turnover rate Established, well known international, privately-held firm w/ extensive resources; 6500+ employees in 34 offices; \$1.5 Billion in revenue (\$120 Million in Texas employee benefits) Market presence: \$19 Billion in premiums written w/ 42% of that related to benefits consulting Five positive references 3. Excellent benefit to PHA; highly qualified; ability to perform data analytics and assist in reducing pharmacy/medical costs 4. Fully compliant with PHA guidelines |

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| Gallagher Benefits Services, Inc. 1900 West Loop South, Ste. 1600 Houston, TX 77027 | \$525,000 | 0 % Goal 0% SB Sub | 17 | 42 | 17 | 9 | 85 | <p>1. 4th lowest price (average \$105,000/year)</p> <p>2. Three person Houston-based team assigned to PHA average 8 years experience; one not present for interview; one possesses appropriate license; team assigned to max. of seven accounts.</p> <p>Extensive experience with TX public entities; 1200 employees in Houston w/125 in benefits area; 3% turnover rate</p> <p>Public entity revenue is \$20 Million/year</p> <p>Established, well known international firm w/ extensive resources; 26,000 employees in 80 offices world-wide</p> <p>Market presence: 3rd largest broker in world w/ \$5.6 Billion in revenue</p> <p>Three positive references</p> <p>3. Sufficient benefit to PHA; ability to perform additional services but additional costs to reduce pharmacy costs.</p> <p>4. Mostly compliant with PHA guidelines</p> |

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| McGriff, Seibels & Williams, Inc. 5080 Spectrum Drive, Suite 900E Addison, TX 75001 | \$447,500 | 0 % Goal 0% SB Sub | 20 | 39 | 16 | 9 | 84 | <p>1. <i>Incumbent</i>; Lowest price (average \$89,500/year)</p> <p>2. Four person Dallas-based team assigned to PHA average 15 years experience w/ five years on PHA account; possess appropriate licenses; team assigned to max. of seven accounts</p> <p>Extensive experience with TX public entities. 250 employees in Houston w/ 35 in benefits area but Public Entity section is based in Dallas office, which has 86 employees, 12 of which are in benefits; <5% turnover rate</p> <p>Established, well known regional firm w/ extensive resources. Owned by BB&T; 900 employees in 13 offices in U.S. w/ three in Texas</p> <p>Market presence: 5th largest broker in world; >\$3 Billion in premiums written; \$875 Million in annual revenue.</p> <p>Four positive references; one neutral reference</p> <p>Several service-related issues during current contract; less pro-active than desired.</p> <p>3. Adequate benefit to PHA; qualified; ability to perform data analytics and assist in reducing pharmacy/medical costs</p> <p>4. Mostly compliant with PHA guidelines</p> |

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| IPS Advisors, LLP 10000 North Central Expressway Suite 100 Dallas, TX 75231 | \$460,925 | 0 % Goal 0% SB Sub | 19 | 34 | 15 | 10 | 78 | <p>1. 2nd lowest price (average \$91,290/year)</p> <p>2. Three person Houston-based team assigned to PHA average 20 years experience but only a year with IPS; most possess appropriate licenses; team assigned to max. of seven accounts</p> <p>Substantial experience with smaller public entities; 3 employees in Houston w/ all in benefits area; <3% turnover rate</p> <p>38 year old privately-held firm w/ limited resources; 50 employees in Dallas, Houston, Austin, and San Antonio.; \$20 Million in total annual revenue</p> <p>Questionable Market presence: refused to disclose amount of premiums written</p> <p>300 clients, of which 45 are smaller TX public entities</p> <p>Two positive references</p> <p>3. Questionable benefit to PHA; team members appear very knowledgeable; lack of insurance market leverage compared to other proposers; outsource several of services PHA desires</p> <p>4. Fully compliant with PHA guidelines</p> |

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| Alliant Insurance Services 5444 Westheimer, Suite 500 Houston, TX 77056 | \$750,000 | 0 % Goal 0% SB Sub | 12 | 37 | 17 | 9 | 75 | <p>1. Highest price (average \$150,000/year)</p> <p>2. Four person Houston-based team assigned to PHA average 6 years experience and 2 years w/ Alliant; one possesses appropriate license; team assigned to max. of seven accounts.</p> <p>Substantial experience with several large national private accounts but minimal with Texas governmental entities compared to several other proposers.</p> <p>20% turnover rate</p> <p>Established, well known, 53% employee-owned firm w/ extensive resources; 2,900 employees in 90 U.S. offices.</p> <p>Market presence: 11th largest broker in world w/ \$1 Billion in revenue</p> <p>Two positive references</p> <p>3. Sufficient benefit to PHA; ability to perform additional services desired by PHA</p> <p>4. Mostly compliant with PHA guidelines</p> |
| The following respondents were not ranked among the top 5 and are listed in alphabetical order below. | | | | | | | | |
| Crystal & Company | | | | | | | | |
| USI Southwest, Inc. | | | | | | | | |
| Regions Insurance Inc. | | | | | | | | |