



**CITY OF WHITE HOUSE**  
RFP INSURANCE BROKER/CONSULTANT  
EVALUATION SCORES

PROPOSAL									
	Total Available Points	Benefits, Inc	Employee Security Planning	Heritage Financial Group	Hylant	Insurance Benefits Associates	Lockton Companies	Sherrill Morgan	Taylor & Sons
Perceived ability to negotiate a benefits program that meets City/s needs	20	8	17	13	18	10	15	9	12
Demonstrated expertise in negotiating benefit plans on behalf of current clients	20	8	17	13	18	9	15	11	13
Demonstrated knowledge and/or technical support related to the implementation of an Online Benefits Open Enrollment Process	20	9	16	14	14	15	15	14	16
Has availability and accessibility, also, availability to attend multiple insurance meetings during the year	20	13	16	15	20	15	16	14	15
Experience, professional credentials, and references	20	11	14	13	19	14	19	14	15
Proposal was clear, concise, and logical and/or sequential form	20	10	15	9	18	7	18	15	12
<b>Total Score</b>	<b>120</b>	<b>59</b>	<b>95</b>	<b>77</b>	<b>107</b>	<b>70</b>	<b>98</b>	<b>77</b>	<b>83</b>
	100%	49.17%	79.17%	64.17%	89.17%	58.33%	81.67%	64.17%	69.17%
COMMENTS	N/A	-Didn't submit enough copies	-No Organizational Structure Identified	-No Organizational Structure Identified		-Omitted several items looking for	-Impressive reference list	-Impressive reference list	-No Errors and Omissions certificate
		-Proposal was clear until the fee schedule.	-No Errors and Omissions certificate	-No Errors and Omissions certificate					

CONCLUSION									
	Total Available Points	Benefits, Inc	Employee Security Planning	Heritage Financial Group	Hylant	Insurance Benefits Associates	Lockton Companies	Sherrill Morgan	Taylor & Sons
Overall qualifications and likelihood to succeed in your opinion	20	7	13	10	19	10	14	9	10
<b>Total Score</b>	<b>20</b>	<b>7</b>	<b>13</b>	<b>10</b>	<b>19</b>	<b>10</b>	<b>14</b>	<b>9</b>	<b>10</b>
	100%	35.0%	65.0%	50.0%	95.0%	50.0%	70.0%	45.0%	50.0%

OVERALL									
	Total Available Points	Benefits, Inc	Employee Security Planning	Heritage Financial Group	Hylant	Insurance Benefits Associates	Lockton Companies	Sherrill Morgan	Taylor & Sons
<b>Total Score</b>	<b>140</b>	<b>66</b>	<b>108</b>	<b>87</b>	<b>126</b>	<b>80</b>	<b>112</b>	<b>86</b>	<b>93</b>
	100%	47.1%	77.1%	62.1%	90.0%	57.1%	80.0%	61.4%	66.4%