



## PROPOSAL SUMMARY FORM

PROJECT NUMBER 2021-01  
PROJECT NAME EMPLOYEE BENEFIT CONSULTING SERVICES  
DUE DATE; AUGUST 4, 2020 – 12:00 NOON  
DEPARTMENT: HUMAN RESOURCES

	M3 MADISON WI	USI INSURANCE MADISON WI	COTTINGHAM & BUTLER MADISON WI	HORTON GROUP WAUKESHA WI	HAYS MILWAUKEE WI
RATER 1	65	67	60	65	48
RATER 2	60	55	63	70	50
RATER 3	84	82	84	72	64
RATER 4	69	76	68	71	51
RATER 5	75	60	65	45	50
<b>TOTAL SCORE</b>	<b>353</b>	<b>340</b>	<b>340</b>	<b>323</b>	<b>263</b>

**Qualifications were evaluated based on the following criteria and Interviews:**

**Completeness of the Proposal – 10 POINTS MAXIMUM**

- Including clear understanding of requirements
- Ability to meet the minimum requirements
- Provided completed Proposal form
- Provided completed Exhibit A

**Experience & References – 30 POINTS MAXIMUM**

- Qualification of personnel
- Experience of personnel
- Experience of firm
- References shall include companies of similar size with similar requirements

**Services Provided – 30 POINTS MAXIMUM**

- Ability of consultant to render satisfactory service
- Sufficient resources knowledgeable in employee benefits, wellness, labor negotiations and financial analysis related to employee benefit functions.
- Evaluation of consultant's standard response time.
- Distinctive service characteristics.
- Evaluators will consider whether the list of exceptions hinder consultant's ability to perform the requirements of RFP

**Proposed Pricing – 30 POINTS MAXIMUM**

- Reasonableness of cost proposal
- Evidence of efficient use of resources

**The top four agencies were interviewed with M3 being the unanimous first choice by all County staff who attended all four interviews. Hays was not interviewed due to the low score on the written qualifications & cost proposal.**

**Request for Proposal was advertised in the Janesville Gazette and on the Internet.**

**PREPARED BY:           JODI MILLIS            
          PURCHASING MANAGER**

**DEPARTMENT HEAD RECOMMENDATION: \_\_\_\_\_**

**SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_**

**GOVERNING COMMITTEE APPROVAL: \_\_\_\_\_  
**CHAIR VOTE DATE****