

TECHNICAL PROPOSAL QUALIFICATIONS EVALUATION

PROJECT: RFP for Actuarial Services for COG General Employees RFP#: FPEN-180084-DH

Pension Plan and COG Retiree Health Insurance Trust Fund

EVALUATOR#: 3

DATE: 6/28/19

FIRM NAME: ACN

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	50	Tampa office
o Capability of Meeting Time and Budget	45	40	~ 73-77K ~ 10 wks Val to be done by 12/15/18 4619000b repts 9/30/19
TOTAL	100	90	✓

WRITTEN PROPOSAL EVALUATION

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EVALUATOR#: 3 DATE: 6/28/18

FIRM NAME: AON

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience	30	25*	*only few flacipes as clients, mostly school bds
o Project Approach	30	30	
o Project Manager	15	15	
o Project Team	15	10*	
o Project Schedule	5	5	
o Project Organization	5	5	
TOTAL	100	90✓	

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PROJECT: RFP for Actuarial Services for COG General Employees RFP#: FPEN-180084-DH
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 EVALUATOR#: 3 DATE: 6/28/18
 FIRM NAME: BOLTON

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	55	Baltimore HQ Some placements
o Capability of Meeting Time and Budget	45	20	draft 9 wks after date 97500 High Budget
TOTAL	100	75	

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DATE: 6/28/18

FIRM NAME: BOLTON

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience	30	25	
o Project Approach	30	25	
o Project Manager	15	15	
o Project Team	15	15	
o Project Schedule	5	5	
o Project Organization	5	5	
TOTAL	100	90	Too Expensive though

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DATE: 6/28/18

FIRM NAME: BOOMERSHINE

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	45	no pla cities
o Capability of Meeting Time and Budget	45	30 *	76K Oct Mtg 1 Nov-Dec Precon. * Jan-Mar Mtg 2, finalize vals.
TOTAL	100	75	

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FIRM NAME: BOOMERSHINE DATE: 6/28/18

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience*	30	15	Small office in MD 3 Sr. Actuaries on team * No Florida Accounts listed
o Project Approach	30	30	
o Project Manager	15	15	
o Project Team	15	15	
o Project Schedule	5	3	
o Project Organization	5	5	
TOTAL	100	83	✓

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 FIRM NAME: CONDUENT

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	55	
o Capability of Meeting Time and Budget	45	35	267K long schedule
TOTAL	100	90	

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DATE: 10/28/18

FIRM NAME: CONDUENT

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience	30	20*	Multi turnovers/mergers... Fla exp limited *
o Project Approach	30	30	
o Project Manager	15	15	
o Project Team	15	15	
o Project Schedule	5	2	Schedule: Rec data Jan-Feb Final val June long Sched.
o Project Organization	5	5	
TOTAL	100	87	

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DATE: 6/28/19

FIRM NAME: FOSTER & FOSTER

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	55	Bradley Herricks designation current actuary for Police & Fire consulting actuary have joined Foster & Foster
o Capability of Meeting Time and Budget	45	40	50K in 18 70K Aug 19 91K in 19 schedule - report done ~ 8 wks after data recd.
TOTAL	100	95	

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DATE: 10/28/18

FIRM NAME: FOSTER & FOSTER

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience	30	30	PE Myers of C 7250 Flac City clients
o Project Approach	30	30	
o Project Manager	15	15	
o Project Team	15	15	
o Project Schedule	5	5	
o Project Organization	5	5	
TOTAL	100	100 ✓	

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DATE: 6/28/18

FIRM NAME: GALLAGHER

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	40	o Florida government *
o Capability of Meeting Time and Budget	45	45	\$17.5K schedule change 8 wks after data rec'd
TOTAL	100	85	

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FIRM NAME: GALLAGHER DATE: 4/28/18

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience	30	20	No Fla. Plan cities
o Project Approach	30	30	have school Bds & counties
o Project Manager	15	15	
o Project Team	15	15	
o Project Schedule	5	2	
o Project Organization	5	5	little longer sched than others 15 wks
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DATE: 6/28/18

FIRM NAME: GRS

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	55	Some general policies are provided and oped work in it, more qeab
o Capability of Meeting Time and Budget	45	35	78.5K
TOTAL	100	90	le wks after data collected draft val provided very short turnaround realistic?

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FIRM NAME: GRJ

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience	30	25	
o Project Approach	30	25	
o Project Manager	15	15	
o Project Team	15	15	
o Project Schedule	5	5	
o Project Organization	5	5	
TOTAL	100	90	

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DATE: 6/28/18

FIRM NAME: NYHART

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	55	Some Fla Cities St Pete, Daytona Beach, Miami Orlando ..
o Capability of Meeting Time and Budget	45	45	will transfer 12 wk pension.
TOTAL	100	100	

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FIRM NAME: NYHART

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience	30	30	
o Project Approach	30	30	
o Project Manager	15	15	
o Project Team	15	15	
o Project Schedule	5	2	unclear
o Project Organization	5	5	
TOTAL	100	97	/

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FIRM NAME: SEGAL

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	50	sample contract w/ modified terms & conditions
o Capability of Meeting Time and Budget	45	40	Atlanta few gen per fa multi police & fire
TOTAL	100	90 ✓	101K - price way above others w/ comparable s'cs. + charge to correct data.

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FIRM NAME: LEGAL

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience	30	28	few flaccets
o Project Approach	30	25	charge to correct data -
o Project Manager	15	15	
o Project Team	15	15	
o Project Schedule	5	2	Schedule timing unclear
o Project Organization	5	5	
TOTAL	100	89	90

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FIRM NAME: WJ CONSULTING

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	50	Fla Lauderdale Jc Fla cities minimal Arcadia Miami FOP
o Capability of Meeting Time and Budget	45	45	875K similar school.
TOTAL	100	95 ✓	

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DATE: 6/28/18

FIRM NAME: USI CONSULTING

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience	30	20	* only few flr citis
o Project Approach	30	30	
o Project Manager	15	15	
o Project Team	15	15	
o Project Schedule	5	5	
o Project Organization	5	5	
TOTAL	100	90	