

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#: 2

DATE: 6-26-18

FIRM NAME: ADN CONSULTING, INC.

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	50	BASE INCLUDING A NUMBER OF PROBABILITIES IS A POSITIVE
o Capability of Meeting Time and Budget	45	35	
TOTAL	100	85	

WRITTEN PROPOSAL EVALUATION

PROJECT: RFP for Actuarial Services for COG General Employee RFP#: FPEN-180084-DH
 Pension Plan and COG Retiree Health Insurance Trust Fund
 EVALUATOR#: 2 DATE: 6-26-18

FIRM NAME: AON CONSULTING, INC.

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience	30	20	
o Project Approach	30	20	
o Project Manager	15	12	
o Project Team	15	12	
o Project Schedule	5	3	
o Project Organization	5	3	
TOTAL	100	70	

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#: 2 DATE: 6-26-18
FIRM NAME: Barton Partners, INC.

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	50	GRAT DEAR OF FUND EXPERIENCE AND EXISTING ACCOUNTS
o Capability of Meeting Time and Budget	45	35	
TOTAL	100	85	

WRITTEN PROPOSAL EVALUATION

PROJECT: RFP for Actuarial Services for COG General Employee RFP#: FPEN-180084-DH
 Pension Plan and COG Retiree Health Insurance Trust Fund
 EVALUATOR#: 2

DATE: 6-26-18

FIRM NAME: BOLTON PARTNERS, INC.

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience	30	25	o NEW CREDENTIALS
o Project Approach	30	25	TEAM WITH FLORIDA SPECIFIC KNOWLEDGE THAT SHOWN BE HELPFUL,
o Project Manager	15	12	SEEMS TO BE A
o Project Team	15	12	GOOD TEAM WITH
o Project Schedule	5	5	QUALITY DEPTH.
o Project Organization	5	5	
TOTAL	100	(84)	

TECHNICAL PROPOSAL QUALIFICATIONS EVALUATION

PROJECT: RFP for Actuarial Services for COG General Employees RFP#: EPEN-180084-DH
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 EVALUATOR#: 2 DATE: 6-27-18
 FIRM NAME: BOOMERSHINE CONSULTING GROUP, LLC

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	50	
o Capability of Meeting Time and Budget	45	40	
TOTAL			
	100	90	

WRITTEN PROPOSAL EVALUATION

PROJECT: RFP for Actuarial Services for COG General Employee RFP#: FPEN-180084-DH
 Pension Plan and COG Retiree Health Insurance Trust Fund
 EVALUATOR#: 2 DATE: 6-27-18

FIRM NAME: BOMIESHINE CONSULTING GROUP, LLC

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience	30	25	
o Project Approach	30	25	
o Project Manager	15	12	
o Project Team	15	13	
o Project Schedule	5	5	
o Project Organization	5	5	
TOTAL	100	85	

TECHNICAL PROPOSAL QUALIFICATIONS EVALUATION

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

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EVALUATOR#: 2

DATE: 6-26-18

FIRM NAME: CONDUENT HR CONSULTING, LLC

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	45	WILL COORDINATE PEOPLE ON THE TEAM BUT THE FACT THAT THEY WERE JUST PURCHASED BY A PRIVATE EQUITY FIRM DOES ARISE CONCERN
o Capability of Meeting Time and Budget	45	35	MORE DETAIL WOULD HAVE BEEN HELPFUL AS TO HOW A TYPICAL VALUATION WORKING COMMUNICATION TAKES PLACES
TOTAL	100	80	

WRITTEN PROPOSAL EVALUATION

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 EVALUATOR#: 2 DATE: 6-26-18

FIRM NAME: CONQUEST HR CONSULTING, LLC

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience	30	25	NOT CURRENTLY STARTED
o Project Approach	30	20	
o Project Manager	15	15	
o Project Team	15	10	
o Project Schedule	5	5	
o Project Organization	5	5	
TOTAL			
	100	80	

TECHNICAL PROPOSAL QUALIFICATIONS EVALUATION

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Pension Plan and COG Retiree Health Insurance Trust Fund

EVALUATOR#: 2

DATE: 0-27-18

FIRM NAME: FOSTER AND FOSTER CONSULTING ACTUARIES, INC.

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	55	CLEAR ABILITY AS WELL AS EXPERIENCE — BREADTH OF KNOWLEDGE AND DEPTH OF TEAM BOTH VERY STRONG
o Capability of Meeting Time and Budget	45	40	FLORIDA KNOWLEDGE AND EXPERIENCE MEANFUL
TOTAL	100	(95)	

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DATE: 6-27-18

FIRM NAME: FOSTER AND FOSTER CONSULTING ACTUARIES, INC.

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience	30	30	
o Project Approach	30	28	
o Project Manager	15	15	
o Project Team	15	15	
o Project Schedule	5	5	
o Project Organization	5	5	
TOTAL			
	100	98	

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#: 2 DATE: 6-27-18

FIRM NAME: GABRIEL, ROEDER, SMITH AND COMPANY

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	45	Good FROMINA EXPERIENCE DEED TEAM
o Capability of Meeting Time and Budget	45	40	
TOTAL	100	85	

WRITTEN PROPOSAL EVALUATION

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 EVALUATOR#: 2

DATE: 6-27-18

FIRM NAME: GABRIEL, ROEDER, SMITH AND COMPANY

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	12	
o Project Schedule	5	5	
o Project Organization	5	5	
TOTAL	100	87	

TECHNICAL PROPOSAL QUALIFICATIONS EVALUATION

PROJECT: RFP for Actuarial Services for COG General Employees RFP#: FPEN-180084-DH
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 EVALUATOR#: 2 DATE: 6-26-18
 FIRM NAME: GALLAGHER BENEFIT SERVICES, INC.

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	50	
o Capability of Meeting Time and Budget	45	35	
TOTAL	100	85	

WRITTEN PROPOSAL EVALUATION

PROJECT: RFP for Actuarial Services for COG General Employee RFP#: FPEN-180084-DH
 Pension Plan and COG Retiree Health Insurance Trust Fund
 EVALUATOR#: 2

DATE: 6-26-18

FIRM NAME: GRUBB HER BENEFIT SERVICES, INC.

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) ✓	

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#: 2 DATE: 6-27-18

FIRM NAME: THE HOWARD E. NYHART COMPANY, INC.

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	40	
o Capability of Meeting Time and Budget	45	35	
TOTAL			
	100	(75)	

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 EVALUATOR#: 2

DATE: 6-27-18

FIRM NAME: THE HOWARD E. NYHART COMPANY, INC.

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience	30	20	
o Project Approach	30	20	
o Project Manager	15	10	
o Project Team	15	10	
o Project Schedule	5	5	
o Project Organization	5	5	
TOTAL	100	(70)	

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EVALUATOR#: 2

DATE: 6-26-18

FIRM NAME: THE SIEGAL COMPANY

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	45	MORE FROM NA SPECIFIC EXAMINER WOULD HAVE HELPED THE SCORE
o Capability of Meeting Time and Budget	45	35	
TOTAL	100	80	

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DATE: 6-26-18

FIRM NAME: THE SEGM COMPANY

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience	30	25	WEEK FROM A EXPERIENCE
o Project Approach	30	25	PROFANITY OFFER BY
o Project Manager	15	12	NATURAL EXPERIENCE — BUT
o Project Team	15	10	FLORIDA EXPERIENCE IS
o Project Schedule	5	5	IMPORTANT AS THESE ARE
o Project Organization	5	5	A NUMBER OF ISSUES
TOTAL			AND REPORTING REQUIREMENTS
			THAT ARE SPECIFIC
			TO FLORIDA
		100	(82) ✓

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DATE: 6-27-18

FIRM NAME: USI Consulting Group

TECHNICAL QUALIFICATIONS (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Ability	55	50	Appear to be well qualified based on team credentials as well as the firm's depth
o Capability of Meeting Time and Budget	45	40	
TOTAL			
	100	90	

WRITTEN PROPOSAL EVALUATION

PROJECT: RFP for Actuarial Services for COG General Employee RFP#: FPEN-180084-DH
 Pension Plan and COG Retiree Health Insurance Trust Fund
 EVALUATOR#: 2 DATE: 6-27-19

FIRM NAME: USI CONSULTING GROUP

WRITTEN PROPOSAL (100 PTS)	POINT VALUE	POINTS AWARDED	COMMENTS
o Project Understanding/Experience	30	20	
o Project Approach	30	25	
o Project Manager	15	15	
o Project Team	15	12	
o Project Schedule	5	5	
o Project Organization	5	5	
TOTAL	100	82	