Segal

Employee Health Benefits Consultant Services
<u>Summary of Response to RFP</u>

<u>Evaluation Criteria</u>:

<table>
<tr><td>Directly Related Experience:</td><td><u>State of Wisconsin, Dept. of Employee Trust Fund</u>: (2015) 241,000 participants; retained to provide analysis, design, management and communication of the State’s health insurance program for employees and retirees.
<u>Teacher Retirement System of Texas</u>: (2019 – present) 725,000 participants; works as the benefits consultant for the program, including plan design, procurement, analysis, cost and quality management for medical and pharmacy benefit programs.
<u>State of Illinois, Bureau of Benefits</u>: (2021) 440,000 participants; provide the entity with assistance with procurements related to health benefit options for its participants.
See pp. 72-74 of proposal, Vendor’s Qualifications § 5.5
See also pp. 29 of proposal, Consulting Capabilities § 3.1</td></tr>
<tr><td>Price:</td><td><u>Total Max Bid</u>: $575,000

See attached Official Proposal Price Sheet and Price Comparison Table.</td></tr>
<tr><td>Plan/Schedule:</td><td><u>Plan</u>:
Four-phase plan set forth in Executive Summary, pp. 2-3 of proposal:
History and Market Review
Goals/Strategy Development
Opportunity for Review
Recommendations
See Topics for Analysis and Recommendations, pp. 14-21 of proposal.
See also pp. 31-42 of proposal, for additional plan details.</td></tr>
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	Schedule: Appendix I: Work Plan – shows Vendor will begin work upon execution of the contract and have a draft report ready for the Subcommittee by September.
Availability:	• Indicates 24/7 availability of the team at p. 76 of proposal. • Available to attend monthly meetings of the subcommittee and ad hoc meetings, as needed, p. 12 of proposal. No Arkansas office, planning to utilize Atlanta team.
Personnel:	• Kenneth Vieira, Account Executive • Patrick Klein, Account Manager • Matthew Kersting, Lead Actuary • *See* Org. Chart, p. 65 of proposal. • *See also* Team Bios at pp. 66-69 of proposal; and Resumes at Segal Team Resumes Tab.
Past Performance:	Founded in 1939, has 82 years of experience developing health and retirement programs; 80 Years of Innovation Table at p. 32 of proposal. • *See* References, pp. 72-74 of proposal. • *See also* attached References Table • *See also* Brief Professional History, p. 62 of proposal.
Compliance with RFP Requirements:	*See* Attached Checklist.
Subcontractors:	None listed.