

Employee Health Benefits Consultant Services
Summary of Response to RFP

Evaluation Criteria:

<p>Directly Related Experience:</p>	<ul style="list-style-type: none"> • Served as consultant to the State and Public School Life and Health Insurance Task Force (2013-2014) • Stated in Section 5.5 of proposal response that they are “constrained by Non-Disclosure Agreements”, and unable to provide client information. As such, there is no direct experience or comparable contracts listed in the proposal.
<p>Price:</p>	<p><u>Total Max Bid:</u> \$345,000</p> <p><i>See attached Official Proposal Price Sheet and Price Comparison Table.</i></p>
<p>Plan/Schedule:</p>	<p><u>Plan:</u></p> <ul style="list-style-type: none"> • Obtain all claim and demographic data • Identify gaps in care and opportunities to create programs (estimates approximately 3 weeks to organize data into plans) • Develop programs and test data • Report results to the Subcommittee <p><i>See Executive Summary, Section 5.4 of proposal.</i></p> <p><u>Schedule:</u></p> <p>States will be able to deliver programs and processes to the Subcommittee before October 15, 2021.</p>
<p>Availability:</p>	<ul style="list-style-type: none"> • Not directly mentioned in proposal. • Offices located in Memphis, TN
<p>Personnel:</p>	<ul style="list-style-type: none"> • John Collier, Executive Vice President • Jeff Darnell, Benefits Practice Leader • Sam Collier, Benefits Consultant • Elizabeth Walker, Account Manager • Hillary Puckett, Account Manager • Bailey Boyd, Account Assistant <p><i>See Org. Chart and Bios, Section 5.5 of proposal.</i></p>

Collier (Cont'd)

Past Performance:	<i>See</i> Financial Modeling and Strategy Output, PowerPoint presented to the State and Public School Life and Health Insurance Task Force, 2014, attached under Section 1.15 of proposal. No references provided.
Compliance with RFP Requirements:	<i>See</i> Attached Checklist.
Subcontractors:	None listed in OPPS, but response to Section 3.0 mentions “potentially subcontracting with other firms who specialize in certain specialized functions.”