

**SCHOOL DISTRICT FIVE OF LEXINGTON AND RICHLAND COUNTIES
RFP EVALUATION FORM
BENEFIT ENROLLMENT SERVICES
SOLICITATION # 2021-037**

Vendor Name: Pierce Group Benefits

CRITERIA	POINT VALUE	SCORE
Qualifications and Experience	40	40
Technical Capabilities	35	34
Response to the Scope of Work	25	24
GRAND TOTAL SCORE (Possible 100)	100	98

EVALUATOR CERTIFICATION

I hereby certify that I have evaluated this firm based on the Evaluation Criteria listed above and no other criteria were used.

Evaluator Name _____ Date: 7/11/21

Evaluator Signature _____

NARRATIVE EXPLANATION OF SCORES

Vendor Name: Pierce Group Benefits

I. Qualifications & Experiences

includes Org. chart over 220 sections
all employee job descriptions shared & names 176,000 employees
districts in SC, NC, & VA
references included - Lex! Org. Little endorsed
↳ some individual letters included

II. Technical Capabilities

apps - QR codes - emails - website
videos; live chats

III. Response to the Scope of Work

2 counselors available & office staff
all questions answered in Section X4

* User-friendly features; significant experience w/ districts of various sizes (small, medium & large); a workforce fully equipped to respond to our annual & yearly needs

Evaluator
Signature _____

**SCHOOL DISTRICT FIVE OF LEXINGTON AND RICHLAND COUNTIES
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Vendor Name: HUB International Midwest Limited

CRITERIA	POINT VALUE	SCORE
Qualifications and Experience	40	40
Technical Capabilities	35	30
Response to the Scope of Work	25	25
GRAND TOTAL SCORE (Possible 100)	100	95

EVALUATOR CERTIFICATION

I hereby certify that I have evaluated this firm based on the Evaluation Criteria listed above and no other criteria were used.

Evaluator Name _____ Date: 7/12/21

Evaluator Signature _____

NARRATIVE EXPLANATION OF SCORES

Vendor Name: HUB International Midwest Limited

Qualifications & Experience

lots of SC school districts - varied sizes

know the ins & outs of SC - a plus! (PEBA & beyond)

20+ yrs of experience as a company

Scope Work

bilingual option - great to have!

group orientations & individual meetings

Virtual option, if requested

reiterate that they are an "extension of HR Dept"

plan in place --- accounts for previous provider & seamless transition!

traditional means & methods of meeting - has to be w/ a "counselor"

Experienced yet not innovative as far as methods/means to provide

ease of service & communication of information

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**SCHOOL DISTRICT FIVE OF LEXINGTON AND RICHLAND COUNTIES
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Vendor Name: Mark III Brokerage, Inc.

CRITERIA	POINT VALUE	SCORE
Qualifications and Experience	40	36
Technical Capabilities	35	30
Response to the Scope of Work	25	25
GRAND TOTAL SCORE (Possible 100)	100	91

EVALUATOR CERTIFICATION

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Date: 7/12/21

Evaluator Signature _____

NARRATIVE EXPLANATION OF SCORES

Vendor Name: Mark III Brokerage, Inc.

lots of clients - anyone in SC?! experience w/ many cities & gov'ts!

↳ not enough recommendations!

transition plan is detailed!!

I Do - We Do - You Do organization!

lots of carriers!

* Enrollment options - great - meets the needs of all employees!

but only available during Open Enrollment?!

does not have to be done in person - flexibility is great!

top-of-the-line communication & webbased program!

no app?! - significant gap - easy to access for many

Qualifications & Experience

competent & experienced team

team - not as large as it may need to be?!

experience w/ SC schools - I don't see any?

Evaluator
Signature _____

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Mark III
Vendor Name: ~~Pierce Group Benefits~~

CRITERIA	POINT VALUE	SCORE
Qualifications and Experience	40	37
Technical Capabilities	35	33
Response to the Scope of Work	25	24
GRAND TOTAL SCORE (Possible 100)	100	94

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Evaluator Name _____ Date: 7.13.21
Evaluator Signature _____

NARRATIVE EXPLANATION OF SCORES

Mark III

Vendor Name: Pierce Group Benefits

Mark III is a smaller company of 50 employees. It states that they are a firm focused on NC public entity employee benefits. They did not have any local SC school districts that they are currently working with today.

I did feel that they did an outstanding job of introducing their team to me from the top to the bottom of the chart.

I think they could do a good job at some point but I do not think they have worked out all the details for SC schools as of today. They need one school to start with them and build that confidence. I am not sure that is what Lexington 5 needs today.

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Pierce Group Benefits

Vendor Name: ~~Mark III Brokerage, Inc.~~

CRITERIA	POINT VALUE	SCORE
Qualifications and Experience	40	39
Technical Capabilities	35	35
Response to the Scope of Work	25	25
GRAND TOTAL SCORE (Possible 100)	100	99

EVALUATOR CERTIFICATION

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Evaluator Name _____

Date: _____

7.13.21

Evaluator Signature _____

NARRATIVE EXPLANATION OF SCORES

Pierce Group Benefits

Vendor Name: Mark III Brokerage, Inc.

I felt that Pierce and HUB were pretty much eye to eye on all areas. I gave Pierce one less point in Qualifications and experience because I did not feel they had the SC involvement in the SC districts that HUB did. Overall, both are very qualified and would do an excellent job.

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CRITERIA	POINT VALUE	SCORE
Qualifications and Experience	40	40
Technical Capabilities	35	35
Response to the Scope of Work	25	25
GRAND TOTAL SCORE (Possible 100)	100	100

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Evaluator Signature _____

NARRATIVE EXPLANATION OF SCORES

Vendor Name: HUB International Midwest Limited

Hub did an excellent job
meeting the required expectations.

Evaluator
Signature _____

A handwritten signature in black ink, appearing to be "J. J. [unclear]", written over a horizontal line.



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Vendor Name: HUB International Midwest Limited

CRITERIA	POINT VALUE	SCORE
Qualifications and Experience	40	38
Technical Capabilities	35	33
Response to the Scope of Work	25	22
GRAND TOTAL SCORE (Possible 100)	100	93

EVALUATOR CERTIFICATION

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Evaluator Name: _____ Date: 7-12-21
Evaluator Signature _____

NARRATIVE EXPLANATION OF SCORES

Vendor Name: HUB International Midwest Limited

Q+E: Their experience + understand of what is necessary is well explained. They sense many districts that will help employees transferring to + from one district maintain the voluntary elections more readily.

Tech: All requests were answered above and beyond the requests.

Response: The response was well written, showing their understanding + capabilities on how to assist the Dist 5 employees w/ all of the PEBA knowledge.

Evaluator
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CRITERIA	POINT VALUE	SCORE
Qualifications and Experience	40	35
Technical Capabilities	35	33
Response to the Scope of Work	25	20
GRAND TOTAL SCORE (Possible 100)	100	88

EVALUATOR CERTIFICATION

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Evaluator Signature _____

NARRATIVE EXPLANATION OF SCORES

Vendor Name: Pierce Group Benefits

Q+E: Having worked up Colonial, the Q+E is good but just not as many S.C. districts. They have a lot of NC + VA. The references are old except the ISP one recently written by lax 1.

Technical: Technical requests were answered.

Response to the Scope: Was adequate but another bidder showed/demonstrated so much in their review of PSBA actions and requirements.

Evaluator
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Vendor Name: Mark III Brokerage, Inc.

CRITERIA	POINT VALUE	SCORE
Qualifications and Experience	40	30
Technical Capabilities	35	28
Response to the Scope of Work	25	15
GRAND TOTAL SCORE (Possible 100)	100	73

EVALUATOR CERTIFICATION

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Evaluator Name _____

Date: 7-12-21

Evaluator Signature _____

NARRATIVE EXPLANATION OF SCORES

Vendor Name: Mark III Brokerage, Inc.

Q+E = They do not have the S.C.
PEBA experience as others provided
that are bidding.

Technical = Requests were answered
but more limited detail
compared to other 2
bids.

Response = The actual steps +
requirements are better
explained in the other
bids.

Evaluator
Signature _____

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Vendor Name: HUB International Midwest Limited

CRITERIA	POINT VALUE	SCORE
Qualifications and Experience	40	35
Technical Capabilities	35	35
Response to the Scope of Work	25	25
GRAND TOTAL SCORE (Possible 100)	100	95

EVALUATOR CERTIFICATION

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Vendor - HUB

This RFP was provided in a concise, easy to follow format. Vast experience working with South Carolina school districts was documented. (30+ current SC district clients). Staff experience working with and for PEBA was documented. The firm's philosophy of commitment to service was clearly outlined.

A detailed response to the scope of work in sequential and easy to follow format was included. HUB lists access to 150+ companies for products. Their enrollment process is headed by a former school district benefits administrator and they will meet as a group and individually with employees.

The RFP details plans to schedule with schools, login with each employee and make updates in My Benefits. They also detailed the employee survey option at the end of each employee meeting.

4/13/2021

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CRITERIA	POINT VALUE	SCORE
Qualifications and Experience	40	15
Technical Capabilities	35	20
Response to the Scope of Work	25	5
GRAND TOTAL SCORE (Possible 100)	100	40

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Evaluator Signature _____

Mark III

There was no South Carolina experience listed. They do list several North Carolina school districts as clients. District sizes were not indicated. The preliminary implementation steps were in a separate section and were not easy to follow.

The RFP details that benefits booklets, surveys and videos would be utilized. There was not a great amount of detail regarding personal service.

No details were listed in the response to the scope of work section. Although some of this information may have been available by piecing together information from other sections, the information was not listed in this section. There was no mention of experience or ability to work with "My Benefits" or experience working with PEBA.

Lee/3/2

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Vendor Name: Pierce Group Benefits

CRITERIA	POINT VALUE	SCORE
Qualifications and Experience	40	31
Technical Capabilities	35	24
Response to the Scope of Work	25	10
GRAND TOTAL SCORE (Possible 100)	100	65

EVALUATOR CERTIFICATION

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Evaluator Name _____ Date: 7/13/21

Evaluator Signature _____

Pierce Group

Pierce Group acquired representatives from Colonial. Experience was listed but not in great detail. The RFP lists "vast experience" but was vague. South Carolina clients are listed and a reference provided from a neighboring district.

The preliminary implementation steps were listed in general terms. Responsibilities of the vendor are listed, but not the district. The RFP did list that mobile and chat features are available and there is a local service team. Electronic booklets and videos would be available.

The response to the scope of work was not listed in any detail in the response section. Some information may have been available by piecing together information from the other sections, but was not provided in an easy to follow format.