

SELECTION CRITERIA

EVALUATION WORKSHEET

Project: RFP 24-001 Property Insurance, including Boiler & Machinery & Crime

Evaluator: Finance Team

| Weight | Below Average | Average | Above Average | Excellent |
|--------|---------------|---------|---------------|-----------|
| 10 | 1-3 | 4-5 | 6-8 | 9-10 |
| 25 | 1-6 | 7-12 | 13-18 | 19-25 |
| 5 | 1-2 | 3 | 4 | 5 |

Proposal Date and Time: January 22, 2024 @ 2:00 PM

| Weight | Selection Criteria | Proposers | | | |
|--------|---------------------------------------------------------------------------------------------------------|---------------------|---------|---------|---------------|
| | | Arthur J. Gallagher | Lockton | McGriff | USI Southwest |
| 1. 10 | Price | | | 10 | |
| 2. 25 | Reputation of the vendor & vendor's goods and/or services | 15 | 20 | 25 | 15 |
| 3. 25 | Quality of the vendor's goods and/or services | 10 | 15 | 25 | 10 |
| 4. 25 | Extent to which the goods and/or services meet the district's needs | 10 | 12 | 25 | 10 |
| 5. 5 | Vendor's past relationship with the district (if no past relationship, proposer was given a score of 3) | 3 | 4 | 3 | 3 |
| 6. 10 | Other relevant factors specifically listed in the proposal | 2 | 2 | 10 | 2 |
| 100 | TOTAL | 40 | 53 | 98 | 40 |

Due to the unique nature and volatility of the property insurance market, the district chose to move forward with a single agency and the other three proposers were eliminated after Step 1 and did not provide pricing. Having multiple agencies shop the market is currently not feasible and could have hurt our chances of obtaining the best rate. McGriff was determined to have the best combination of demonstrated experience in the Texas school district property insurance market, most experience with the challenges presented by our geographical area, and a sterling reputation amongst their Texas ISD clients.

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|---------------------------------------|--------------------------------|--------------------|
| Administration Recommendation: | McGriff Insurance Services LLC | |
| Estimated Amount: | Property & Casualty | \$4,379,797 |
| | Flood | 141,370 |
| | Crime | 5,783 |
| | Boiler & Machinery | 13,829 |
| | <u>Total</u> | <u>\$4,540,779</u> |