

# MANATEE COUNTY GOVERNMENT INTENT TO NEGOTIATE

<b>SUBJECT</b>	Employee Health Plan Consulting Services	<b>DATE POSTED</b>	MC <u>11/6/13</u> DS <u>11/6/13</u> CC <u>58</u>
<b>PURCHASING REPRESENTATIVE</b>	Frank Lambertson, 3042	<b>DATE CONTRACT SHALL BE AWARDED</b>	November 12, 2013 or later
<b>DEPARTMENT</b>	County Administrators Office	<b>CONSEQUENCES IF DEFERRED</b>	None
<b>SOLICITATION</b>	RFP #13-1857FL	<b>AUTHORIZED BY DATE</b>	Melissa M. Wendel, CPPO <u>11/5/13</u> November 5, 2013

### NOTICE OF INTENT TO NEGOTIATE

Notice of Intent to Negotiate with Aon Hewitt, Tampa, FL to provide Employee Health Plan Consulting Services for the Manatee County for the County Administrators Office, Employee Health Benefits Division.

### ENABLING/REGULATING AUTHORITY

Federal/State law(s), administrative ruling(s), Manatee County Comp Plan/Land Development Code, ordinances, resolutions, policy.

Manatee County Code of Laws

### BACKGROUND/DISCUSSION

#### PROJECT BACKGROUND:

Manatee County is soliciting proposals from qualified firms experienced in for Employee Health and Welfare Consulting Services. The County is responsible for all medical plan functions for approximately 3,100 employees and 600 retirees.

The County's primary objective is to obtain the services of a qualified firm to assist with annual consulting for our benefit programs including its self funded health plans as well as any future insured products that we might offer. The County offers a unique health plan designed to drive members to better care through preventative, evidence-based medicine. Additionally, the County provides an onsite, integrated Team of clinical professionals to offer coaching and guidance to the members of the plan. This same team also performs all Utilization Management, Care Management, Disease Management and Wellness functions, through the agreement with Aetna.

Additionally, the County is seeking a firm that will be proactive in informing the County of significant or pertinent issues in the area of health and welfare that can benefit or impact the County. Additional consulting services for compensation strategies and retirement benefits may be requested. The County anticipates an agreement will be established to include five (5) one year terms renewable annually.

#### SOLICITATIONS:

The RFP was advertised on the Manatee County website, DemandStar, in the Bradenton Herald and the Tempo News and was at the Manatee County Chamber of Commerce for release to its members. Six (6) proposals were received.

#### Manatee County Firms that were directly solicited:

None

#### Manatee County Firms that submitted proposals:

None

	<ul style="list-style-type: none"> <li>• Ed Hunzeker Email dated 10/29/2013</li> </ul>	<b>FUNDING SOURCE (Acct Number &amp; Name)</b>	506-0004100-531000 <input checked="" type="checkbox"/> Funds Verified <input type="checkbox"/> Insufficient Funds
<b>COST</b>	Annual Cost \$80,000	<b>AMT/FREQ OF RECURRING COSTS (Attach Fiscal Impact Statement)</b>	N/A

Local firms that submitted proposals include:

Aon-Hewitt, Tampa, FL  
Buck Consultants, Tampa, FL  
First Florida Insurance Brokers, Tampa, FL  
Gallagher Benefit Services Inc., Tampa, FL  
Towers Watson, Tampa, FL

Other (non-local) firms that submitted proposals include:

Willis of Florida Inc., Naples, FL

**EVALUATION COMMITTEE (VOTING) MEMBERS:**

Kim Stroud, County Administrator's Office  
Jan Brewer, Financial Management Department, Budget Management Division  
Frank Lambertson, Financial Management Department, Purchasing Division (Chairman)

**Non-Voting Staff Attending:**

Dan Schlandt, Deputy County Administrator

**EVALUATION RESULTS:**

The Evaluation Committee convened on September 23, 2013 to review evaluation committee responsibilities, discuss member's availability for future meetings and the Sunshine Law as applicable to public meetings. During this meeting the committee reviewed the proposals submitted on September 10, 2013 in response to the Employee Health Plan Consulting Services RFP and short-listed the following firms to make oral presentations.

Aon-Hewitt, Tampa, FL  
Gallagher Benefit Services Inc., Tampa, FL  
Towers Watson, Tampa, FL

The Evaluation Committee convened on October 18, 2013 to hear the Oral Presentation from each short-listed firm and to discuss the offers based on the stated requirements in the RFP and consider the information brought forth at the oral presentations, continuing the acquisition process and develop a recommendation to the County Administrator.

Aon Hewitt, Tampa, FL – The firm presented its professional capabilities in a clear and concise manner via their proposal and continued to show these capabilities during the oral presentation. Of particular importance was: the firm's ability to provide the necessary reports in a clear and concise manner for the Board of County Commissioners, County Administration and Employee Health Benefits Division staff; successful past performance with the County and a reasonable pricing structure for required tasks. Additionally, Aon Hewitt proposed an Account Manager who specializes in Health and Welfare networks providing added expertise in that area.

Towers Watson, Tampa, FL – The firm submitted an informative proposal detailing their qualifications and its oral presentation created an informative exchange of ideas. The firm is a respected company in the industry and proposed an accomplished Account Executive to manage the Manatee County account. While impressed with the firm's qualifications Towers Watson was evaluated second by the Evaluation Committee as they had a lesser volume of public sector clients and their extensive reporting was not what the County likely required.

Gallagher Benefit Services Inc., Tampa, FL – Gallagher Benefit Services Inc. submitted a satisfactory proposal and made a good presentation with their team detailing its knowledge of the industry. Other favorable points were their high volume of public sector clients and knowledge of future health reform requirements. However, the Evaluation Committee presumed weak actuarial services ability and did not evaluate the firm higher.

**REMAINING RESPONDENTS:**

These remaining respondents, although well qualified, were not selected based on a comparison of capabilities of the selected firms.

Buck Consultants, Tampa, FL  
First Florida Insurance Brokers, Tampa, FL  
Willis of Florida Inc., Naples, FL

**ESTIMATED COST OF SERVICES:** \$80,000 annually

**FUNDING:** FMD 506-0004100-531000

*The above justifications are a generalized summary of major observations intended only to provide the County Administrator a sufficiently detailed overview of the main observations of a majority of Committee Members. Each Committee Member may have considered one or more facts or factors more or less important than the other Committee Members when voting, and this summary of the Evaluation Committee's decision is not an attempt to exhaustively describe each of the relevant factors which motivated each of the Committee Members to select the rankings described.*

The Evaluation Committee voted 3-0 to proceed with Aon Hewitt, Tampa, FL.

The resulting agreements will be managed by the County Administrators Office, Employee Health Benefits Division

Re: Approval to Negotiate - RFP #13-1857FL - Employee Health Plan Consulting Services  
Ed Hunzeker  
to:  
Melissa Wendel  
10/29/2013 08:50 PM  
Cc:  
Frank Lambertson  
Show Details

Please proceed!

Sent from my iPad

On Oct 29, 2013, at 11:13 AM, "Melissa Wendel" <[melissa.wendel@mymanatee.org](mailto:melissa.wendel@mymanatee.org)> wrote:

Mr. Hunzeker,

The Evaluation Committee formed to evaluate proposals submitted in response to RFP 13-1857FL, **Employee Health Plan Consulting Services**, is recommending contract negotiations commence with **AON Hewitt** of Tampa, Florida.

Upon your approval of the recommendation of the Evaluation Committee, the Purchasing Division will proceed with the posting of the selection and schedule negotiations. If you choose, you may direct staff to present this recommendation to the Board of County Commissioners for consideration.

Thank you,  
Melissa

Melissa M. Wendel, CPPO  
Purchasing Official  
Manatee County Purchasing Division  
941-749-3054

----- Forwarded by Melissa Wendel/MCG on 10/29/2013 11:03 AM -----

From: Frank Lambertson/MCG  
To: Melissa Wendel/MCG@MCG  
Date: 10/29/2013 09:59 AM  
Subject: Approval to Negotiate - RFP #13-18957FL - Employee Health Plan Consulting Services

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## APPROVAL TO NEGOTIATE

**Email to:** Melissa Wendel, CPPO, Purchasing Official  
**Subject:** Recommendation for Negotiation, RFP #13-1857FL Employee Health Plan Consulting Services

Pursuant to Request for Proposal #13-1857FL for Employee Health Plan Consulting Services, authorization from the County Administrator is requested to commence negotiations with **Aon Hewitt, Tampa, FL.**

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First Florida Insurance Brokers, Tampa, FL  
Willis of Florida Inc., Naples, FL

**ESTIMATED COST OF SERVICES:** The estimated annual expenditure is \$80,000.

**FUNDING:** EHB General Account: 506-0004100-531000

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The Evaluation Committee voted 3-0 to proceed with Aon Hewitt, FL.

The resulting agreements will be managed by the County Administrator's Office, Employee Health Benefits Office.

Frank G. Lambertson, Contracts Negotiator  
Manatee County Government, Purchasing Division  
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Bradenton, FL 34205  
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