


# MANATEE COUNTY GOVERNMENT

## INTENT TO NEGOTIATE

<b>SUBJECT</b>	Employee Health and Benefit Consulting Services	<b>DATE POSTED</b>	MC <u>10/18/17</u> 6-D DS <u>10/18/17</u> 6-D. CC
<b>PURCHASING REPRESENTATIVE</b>	Jacob Erickson, 3053	<b>DATE CONTRACT SHALL BE AWARDED</b>	Upon Completion of Successful Negotiations
<b>DEPARTMENT</b>	Human Resources Department	<b>CONSEQUENCES IF DEFERRED</b>	None
<b>SOLICITATION</b>	RFP 17-1584JE	<b>AUTHORIZED BY</b> 	Theresa Webb, CPPO, CPPB, CPSM, C.P.M.

### NOTICE OF INTENT TO NEGOTIATE

Notice of Intent to Negotiate with Arthur J. Gallagher & Co., Tampa, FL. to provide Employee Health and Benefit Consulting Services for the Manatee County Human Resources Department.

### 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 Human Resources Department intends to utilize a consultant to provide Employee Health and Benefit consulting services. The purpose of this RFP is to obtain a consulting firm to assist with ongoing consulting for the County's benefit programs including its self-funded health plans as well as any future insured products that may be offered. The County focuses on providing a forward thinking plan design and approach to health management and wellness. The selected firm shall support the model and the intention behind the model and shall be innovative and comfortable exploring ideas that are non-standard. Furthermore, 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 benefits that can impact the County.

#### SOLICITATIONS:

The RFP was advertised on the Manatee County website. DemandStar and was provided to the Manatee County Chamber of Commerce for release to its members. Seven (7) proposals were received.

Aon Consulting, Inc.	Tampa, FL
Arthur J. Gallagher & Company	Tampa, FL
AssuredPartners	Lakewood Ranch, FL
Benalytics Consulting Group, LLC	Marietta, GA
Lockton Companies	Naples, FL
Trion Group, a Marsh & McLennan Agency	King of Prussia, PA
Towers Watson Delaware, Inc.	Tampa, FL

#### ATTACHMENTS (List in order of attached)

#### FUNDING SOURCE (Acct Number & Name)

Term Agreement

☒ Funds Verified  
☐ Insufficient Funds

**COST** \$150,000 before negotiation

#### AMT/FREQ OF RECURRING COSTS (Attach Fiscal Impact Statement)

N/A

**EVALUATION COMMITTEE (VOTING) MEMBERS:**

Kim Stroud – Health Benefits Manager, Human Resources Department  
Debbie Underwood – Budget Division Manager, Financial Management Department  
Jacob Erickson - Contracts Negotiator, Financial Management Department – Procurement Division (Chairperson)

**Non-Voting Staff Attending:**

Rodney Barnes – Director, Human Resources Department

**EVALUATION RESULTS:**

The Evaluation Committee (the "Committee") convened in August 2017 to review evaluation committee responsibilities, discuss member's availability for future meetings, and the Florida Sunshine Law as applicable to public meetings. The Evaluation Committee then proceeded to review each of the seven (7) proposals for their responsiveness to the requirements of the RFP. As a result of the discussion, the Committee unanimously voted to invite three (3) firms to Oral Presentations. The Evaluation Committee (the "Committee") reconvened in September 2017 to evaluate the aforementioned Oral Presentations.

**Arthur J. Gallagher & Company, Tampa, FL** – Arthur J. Gallagher & Company presented exceptional qualifications in their written proposal and oral presentation. With an office in Tampa and ten (10) offices across the state of Florida, the firm's key personnel demonstrated a unique understanding of the County's health plan through their own independent research and presented a more holistic project approach to employee health and benefit consulting. The Evaluation Committee also noted that the key personnel for Arthur J. Gallagher & Company were readily accessible and willing to work with the County in order to further goals and objectives of Employee Health and Benefits. After further deliberation, it was determined by the Evaluation Committee that Arthur J. Gallagher & Company be recommended for the Intent to Negotiate award.

**Towers Watson Delaware, Inc., Tampa, FL** – Towers Watson Delaware, Inc., also known as Willis Towers Watson, presented very strong qualifications in their written proposal and oral presentation. Willis Towers Watson provided a solid understanding of the County's health plan and presented innovative solutions to the health and benefit issues faced by the County. Upon further investigation however, the Evaluation Committee determined that Willis Towers Watson's project management / approach was not as robust and the proposed price was not as competitive compared to the recommended firm. As a result, the Evaluation Committee determined that the firm should be ranked second.

**Lockton Companies, Naples, FL** – Lockton Companies presented acceptable qualifications in their written proposal and oral presentation. Although very familiar with the County's health plan structure, Lockton Companies' project team relied heavily on their past experience with Collier County and did not provide a complete overview of Lockton Companies as a whole. Although it seemed like Lockton Companies team was very unified, the Evaluation Committee determined that the project approach was relatively limited compared to the direction set forth in the RFP. As a result, the Evaluation Committee determined that Lockton Companies be ranked third.

Upon completion of the Oral Presentations on September 28, 2017, the Committee reconvened on October 3, 2017 in order to continue deliberation and ultimately recommend the Intent to Negotiate award for **Arthur J. Gallagher & Company, Tampa, FL**, to the County Administrator.

**REMAINING RESPONDENTS**

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

Aon Consulting, Inc.	Tampa, FL
AssuredPartners	Lakewood Ranch, FL
Benalytics Consulting Group, LLC	Marietta, GA
Trion Group, a Marsh & McLennan Agency	King of Prussia, PA

**ESTIMATED COST OF SERVICES:** The estimated expenditure is \$150,000 before negotiations.

**FUNDING:** 5060004100-534000 – Other Contractual Services

*The above justifications are a generalized summary of major observations intended only to provide 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 to 0 to proceed with the award to **Arthur J. Gallagher & Company**, Tampa, FL.

The resulting agreement will be managed by the Human Resources Department.