



**QUALIFICATIONS AND COST PROPOSAL SUMMARY FORM**

PROJECT NUMBER 2016-08  
 PROJECT NAME EMPLOYEE BENEFIT CONSULTING SERVICES  
 DUE DATE; OCTOBER 15, 2015 – 12:00 NOON  
 DEPARTMENT: HUMAN RESOURCES

	ASSOCIATED FINANCIAL MADISON WI	HAYS MILWAUKEE WI	HORTON GROUP WAUKESHA WI	WILLIS BROOKFIELD WI	COTTINGHAM & BUTLER DUBUQUE IA
<b>WRITTEN QUALIFICATIONS &amp; COST PROPOSAL SCORE</b>					
RATER 1	100	88	97	63	53
RATER 2	97	89	87	66	58
RATER 3	93	88	78	73	63
RATER 4	94	91	82	74	57
RATER 5	95	96	82	75	70
<b>TOTAL SCORE</b>	<b>479</b>	<b>452</b>	<b>426</b>	<b>351</b>	<b>301</b>
<b>INTERVIEW RANKING</b>					
RATER 1	1	2	3	4	NOT INTERVIEWED
RATER 2	2	3	1	4	NOT INTERVIEWED
RATER 3	1	2	3	4	NOT INTERVIEWED
RATER 4	1	2	3	4	NOT INTERVIEWED
RATER 5	2	1	3	4	NOT INTERVIEWED
<b>PROPOSED COST</b>	<b>\$ 39,000.00</b>	<b>\$ 54,500.00</b>	<b>\$ 40,000.00</b>	<b>\$ 60,000.00</b>	<b>\$ 95,000.00</b>

NOTE: Cottingham & Butler was not interviewed due to low score and high annual cost.

**Qualifications were evaluated based on the following criteria and Interviews:**

**Completeness of the Proposal – 10 POINTS MAXIMUM**

- Including clear understanding of requirements
- Ability to meet the minimum requirements
- Provided completed Proposal form
- Provided completed Exhibit A

**Experience & References – 30 POINTS MAXIMUM**

- Qualification of personnel
- Experience of personnel
- Experience of firm
- References shall include companies of similar size with similar requirements

**Services Provided – 30 POINTS MAXIMUM**

- Ability of consultant to render satisfactory service
- Sufficient resources knowledgeable in employee benefits, wellness, labor negotiations and financial analysis related to employee benefit functions.
- Evaluation of consultant's standard response time.
- Distinctive service characteristics.
- Evaluators will consider whether the list of exceptions hinder consultant's ability to perform the requirements of RFP

**Proposed Pricing – 30 POINTS MAXIMUM**

- Reasonableness of cost proposal
- Evidence of efficient use of resources

**Request for Qualifications and Cost Proposal was advertised in the Beloit Daily News and on the Internet.**

**PREPARED BY: JODI MILLIS**  
**PURCHASING MANAGER**

**DEPARTMENT HEAD RECOMMENDATION: ASSOCIATED FINANCIAL GROUP**

**SIGNATURE**

**DATE**

**GOVERNING COMMITTEE APPROVAL:**

**CHAIR**

**VOTE**

**DATE**