



SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT

Agenda Item Summary

Meeting Date: June 17th, 2020

Purpose: Presentation/Report Recognition X Discussion/ Possible Action
Closed/Executive Session Work Session Discussion Only Consent

From: Chad Doucet, Interim Chief of Staff

Item Title: Discussion and Possible Action to approve the selection of District Insurance Consultant.

Description: The District solicited responses to RFP 2020-06 Insurance Consulting Services for an initial term of two (2) years, with option to renew for one (1), two (2) year term if agreeable to both parties. District staff and insurance committee representative evaluated proposals and interviewed respondents to make recommendations.

Historical Data:

Available records indicate that insurance consultants have assisted district human resources staff and employees with annual health care open enrollment periods, health plan information and prescription drug benefit plans since January 2016.

Recommendation:

Approve the selection of District Insurance Consultant.

District Goal/Strategy:

Strategy 1 We will engage all school community members through transparency and effective communication to promote a positive perception and create a strong brand.

Funding Budget Code and Amount:

CFO Approval

APPROVED BY:

SIGNATURE

DATE

Chief Officer:

Superintendent:

Handwritten signatures in blue ink for Chief Officer and Superintendent.

Handwritten dates in blue ink: 6/10/2020 and 6/10/2020.



SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT

5622 Ray Ellison Drive · San Antonio, Texas 78242 · (210) 977-7025 · Fax (210) 977- 7019

June 11th, 2020

Proposal Evaluation Respondent Rank

The District convened an evaluation committee to review proposals and conduct video conference interviews in response to RFP 2020-06 Insurance Consultant Services. Completed evaluation sheets are provided and the respondents are ranked below based on evaluator scoring:

1. Gallagher Benefits Group
2. SWBC
3. USI
4. NS Insurance Consulting

A handwritten signature in blue ink, appearing to read 'Chad P. Doucet', is written over the typed name.

Chad P. Doucet, RTSBA
Interim Chief of Staff
South San Antonio ISD
(210) 977-7070
chad.doucet@southsanisd.net

Request For Proposal 2020-06 Insurance Consultant Services Evaluation Matrix

RFP - Open Date/Time: June 10th @ 9:00 A.M. CST

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

Part 1					
	Firm Name:	SWBC	USI	Gallagher	NS Ins. Consulting
Response received prior to deadline?		YES	YES	YES	YES
Submission Form Completed?		YES	YES	YES	YES
SSAISD certifications completed?		YES	YES	YES	YES

Date completed: 6/4/2020 Print Name: Chad Dowd Signature: Chad Dowd

Date completed: _____ Print Name: _____ Signature: _____

Part 2						
Criteria	Group/Individual Evaluation Criteria	Description	Weighted value			
1	Completeness and accuracy of the RFP Response	0-25	25	25	24	15
2	Consulting Service's ability to provide services	0-40	35	25	30	20
3	Experience of personnel assigned to the District	0-15	15	10	15	15
4	Relevant experience with other school districts	0-10	5	2	8	10
5	Management and Organization of the Consulting Service.	0-10	10	5	8	6
6						
TOTAL			0-100	90	62	66

Date completed: 6-10-2020
 Evaluator's Name (print): Veronica Ramos

Evaluator's Signature: Veronica Ramos

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Part 1					
Firm Name:	SWBC	USI	Gallagher	NS Ins. Consulting	
Response received prior to deadline?	YES	YES	YES	YES	
Submission Form Completed?	YES	YES	YES	YES	
SSAISD certifications completed?	YES	YES	YES	YES	

Date completed: <u>6/4/2020</u>	Print Name: <u>Chad P. DeWitt</u>	Signature: <u>[Signature]</u>
Date completed:	Print Name:	Signature:

Part 2					
Criteria	Description	Weighted value			
1	Completeness and accuracy of the RFP Response	0-25	<u>25</u>	<u>20</u>	<u>25</u>
2	Consulting Service's ability to provide services	0-40	<u>35</u>	<u>30</u>	<u>35</u>
3	Experience of personnel assigned to the District	0-15	<u>15</u>	<u>15</u>	<u>15</u>
4	Relevant experience with other school districts	0-10	<u>8</u>	<u>5</u>	<u>10</u>
5	Management and Organization of the Consulting Service.	0-10	<u>8</u>	<u>5</u>	<u>8</u>
6					
TOTAL 0-100			<u>91</u>	<u>75</u>	<u>93</u>

Date completed: 6-11-20

Evaluator's Name (print): Sherrri Seaman

Evaluator's Signature: [Signature]

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Part 1					
	Firm Name:	SWBC	USI	Gallagher	NS Ins. Consulting
Response received prior to deadline?		YES	YES	YES	YES
Submission Form Completed?		YES	YES	YES	YES
SSAISD certifications completed?		YES	YES	YES	YES

Date completed: 6/10/2020 Print Name: Clarita Trevino Signature: Clarita Trevino

Date completed: _____ Print Name: _____ Signature: _____

Part 2 Group/Individual Evaluation Criteria						
Criteria	Description	Weighted value				
1	Completeness and accuracy of the RFP Response	0-25	25	28	25	20
2	Consulting Service's ability to provide services	0-40	35	30	35	20
3	Experience of personnel assigned to the District	0-15	12	10	9	10
4	Relevant experience with other school districts	0-10	8	7	10	5
5	Management and Organization of the Consulting Service.	0-10	8	7	8	5
6						
	TOTAL 0-100		88	76	87	60

Date completed: 6/10/2020
 Evaluator's Name (print): Clarita Trevino

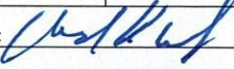
Evaluator's Signature: Clarita Trevino

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Part 1					
Firm Name:	SWBC	USI	Gallagher	NS Ins. Consulting	
Response received prior to deadline?	YES	YES	YES	YES	
Submission Form Completed?	YES	YES	YES	YES	
SSAISD certifications completed?	YES	YES	YES	YES	

Date completed: <u>6/4/2020</u>	Print Name: <u>Chad V Douc</u>	Signature: 
Date completed:	Print Name:	Signature:

Part 2					
Criteria	Group/Individual Evaluation Criteria	Description	weighted value		
1	Completeness and accuracy of the RFP Response		0-25	<u>25</u>	<u>20</u>
2	Consulting Service's ability to provide services		0-40	<u>35</u>	<u>30</u>
3	Experience of personnel assigned to the District		0-15	<u>12</u>	<u>12</u>
4	Relevant experience with other school districts		0-10	<u>8</u>	<u>5</u>
5	Management and Organization of the Consulting Service.		0-10	<u>10</u>	<u>10</u>
6					
	TOTAL		0-100	<u>90</u>	<u>77</u>

Date completed: 6/10/20

Evaluator's Name (print): JEFFREY W. BAXM

Evaluator's Signature: 

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Part 1					
Firm Name:	SWBC	USI	Gallagher	NS Ins. Consulting	
Response received prior to deadline?	YES	YES	YES	YES	
Submission Form Completed?	YES	YES	YES	YES	
SSAISD certifications completed?	YES	YES	YES	YES	

Date completed: 6/4/2020 Print Name: Chad V Douc Signature: [Signature]
 Date completed: _____ Print Name: _____ Signature: _____

Part 2					
Criteria	Group/Individual Evaluation Criteria	Description	Weighted value		
1	Completeness and accuracy of the RFP Response		0-25	24	23
2	Consulting Service's ability to provide services		0-40	27	27
3	Experience of personnel assigned to the District		0-15	15	15
4	Relevant experience with other school districts		0-10	9	9
5	Management and Organization of the Consulting Service.		0-10	10	10
6					
TOTAL			0-100	97	87

Date completed: 6/10/2020
 Evaluator's Name (print): Chad V Douc

Evaluator's Signature: [Signature]

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Part 1					
Firm Name:	SWBC	USI	Gallagher	NS Ins. Consulting	
Response received prior to deadline?	YES	YES	YES	YES	
Submission Form Completed?	YES	YES	YES	YES	
SSAISD certifications completed?	YES	YES	YES	YES	

Date completed: 6/4/2020 Print Name: Chad Douc Signature: [Signature]

Date completed: _____ Print Name: _____ Signature: _____

Part 2						
Criteria	Group/Individual Evaluation Criteria	Description	Weighted value			
1	Completeness and accuracy of the RFP Response	0-25	25 25	20 20	25 25	15 15
2	Consulting Service's ability to provide services	0-40	35 35	35 35	38 38	33 33
3	Experience of personnel assto the District	0-15	15 15	14 14	15 15	15 15
4	Relevant experience with other school districts	0-10	10 8	8 8	10 10	7 7
5	Management and Organization of the Consulting Service.	0-10	10 10	9 9	10 10	7 7
6						
	TOTAL	0-100	93 93	86 86	98 98	77 77

Date completed: 06/10/2020

Evaluator's Name (print): G. Carole Daubenmire

Evaluator's Signature: [Signature]

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Part 1					
Firm Name:	SWBC	USI	Gallagher	NS Ins. Consulting	
Response received prior to deadline?	YES	YES	YES	YES	
Submission Form Completed?	YES	YES	YES	YES	
SSAISD certifications completed?	YES	YES	YES	YES	

Date completed: 6/4/2020 Print Name: Carol Plummer Signature: [Signature]

Date completed: _____ Print Name: _____ Signature: _____

Part 2					
Group/Individual Evaluation Criteria					
Criteria	Description	Weighted value			
1	Completeness and accuracy of the RFP Response	0-25	25	25	10
2	Consulting Service's ability to provide services	0-40	35	20	25
3	Experience of personnel as to the District	0-15	10	15	5
4	Relevant experience with other school districts	0-10	10	10	10
5	Management and Organization of the Consulting Service.	0-10	10	10	10
6			90	80	60
	TOTAL	0-100			

Date completed: 6/10/2020

Evaluator's Name (print): Irma E. Paine

Evaluator's Signature: Irma E. Paine