

**ELECTRONIC - Summary Scoring Sheet**  
**Combination Initial and Final Evaluation Meeting**  
**RFP No. R2114673P1**  
**Employee Benefits Consulting Services**  
**October 30, 2017**

115 S. Andrews Avenue, Room GC-422, Fort Lauderdale, FL 33301

Firm Name	Monica Cepero	Kimm Campbell	Kevin Kelleher	Total	Ranking
Bolton Partners, Inc. and Gelin Benefits Group, LLC (Joint Venture)	61.36	75.36	82.36	219.07	<del>2</del> 3
Gallagher Benefits Services, Inc.	<del>65.07</del> 67.15	<del>76.07</del> 78.15	<del>75.07</del> 75.15	<del>216.21</del> 220.44	<del>3</del> 2
Wells Fargo Insurance Services USA, Inc.	<del>82.15</del> 80.17	<del>88.15</del> 86.07	<del>80.15</del> 78.07	<del>250.44</del> 244.21	1
<b>TIE BREAKER CRITERIA</b>					
1. Vendor located within Broward County as set forth in Subsection 21.31.c.					
2. Vendor which provides domestic partner benefits.					
3. Vendor that has the lowest dollar volume of work, calculated by payments to vendor, by County over a five (5) year period from the date of the submittal.					
4. A re-vote or re-assessment of only the tied vendors.					
5. Preference to vendor receiving a majority of the total first-place votes.					

(Jkz)

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Evaluation Criteria - Project Specific Criteria <i>Complete text of questions provided separately</i>	Maximum Points	Bolton Partners, Inc. and Gelin Benefits Group, LLC (Joint Venture)	Gallagher Benefits Services, Inc.	Wells Fargo Insurance Services USA, Inc.
<b>1. LOCATION</b> (Total Maximum 5 Points)	<b>5</b>	<b>3</b>	<b>0</b>	<b>0</b>
<b>2. COMPANY PROFILE, CHARACTERISTICS OF FIRM AND STAFFING</b> (Total Maximum 15 Points)				
See Evaluation Criteria - question 2a	5	2	4	5
See Evaluation Criteria - question 2b	5	2	4	5
See Evaluation Criteria - question 2c	5	1	4	4
<b>3. QUALITY OF SERVICE AND CUSTOMER SERVICE</b> (Total Maximum 30 Points)				
See Evaluation Criteria - question 3a	4	2	3	3
See Evaluation Criteria - question 3b	4	2	3	4
See Evaluation Criteria - question 3c	4	2	3	4
See Evaluation Criteria - question 3d	4	1	2	4
See Evaluation Criteria - question 3e	4	1	2	3
See Evaluation Criteria - question 3f	5	3	4	5
See Evaluation Criteria - question 3g	5	2	4	4
<b>4. DATE WAREHOUSE</b> (Total Maximum of 10 Points)				
See Evaluation Criteria - question 4a	10	8	7	10
<b>5. QUESTIONNAIRE AND PERFORMANCE GUARANTEES</b> (Total Maximum of 20 Points)				
See Evaluation Criteria - question 5a	10	6	7	9
See Evaluation Criteria - question 5b	10	7	6	8
<b>6. PRICE POINTS ENTERED BY PURCHASING</b> (Total Maximum of 20 Points)				
See Evaluation Criteria - question 6a	12	12.00	615 5.67	5.67 6.15
See Evaluation Criteria - question 6b	8	7.36	800 6.40	6.40 8.00
<b>TOTAL SCORE ENTERED BY PURCHASING</b>	100 One Hundred	61.36	65.07	82.15

67.15      80.07

**Monica Cepero**

Name \_\_\_\_\_  
 Signature \_\_\_\_\_

By signing this document I certify that I have abided by the Code of Silence Ordinance and have not been influenced or coerced by anyone in the assignment of the points by me for this procurement.

(JAC)

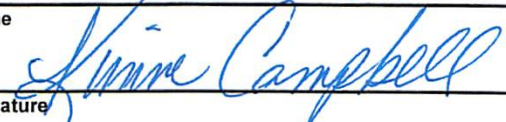


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<b>1. LOCATION</b> (Total Maximum 5 Points)	<b>5</b>	<b>3</b>	<b>0</b>	<b>0</b>
<b>2. COMPANY PROFILE, CHARACTERISTICS OF FIRM AND STAFFING</b> (Total Maximum 15 Points)				
See Evaluation Criteria - question 2a	<b>5</b>	<b>2</b>	<b>5</b>	<b>5</b>
See Evaluation Criteria - question 2b	<b>5</b>	<b>3</b>	<b>4</b>	<b>5</b>
See Evaluation Criteria - question 2c	<b>5</b>	<b>1</b>	<b>5</b>	<b>5</b>
<b>3. QUALITY OF SERVICE AND CUSTOMER SERVICE</b> (Total Maximum 30 Points)				
See Evaluation Criteria - question 3a	<b>4</b>	<b>2</b>	<b>4</b>	<b>3</b>
See Evaluation Criteria - question 3b	<b>4</b>	<b>4</b>	<b>4</b>	<b>4</b>
See Evaluation Criteria - question 3c	<b>4</b>	<b>2</b>	<b>3</b>	<b>4</b>
See Evaluation Criteria - question 3d	<b>4</b>	<b>3</b>	<b>3</b>	<b>4</b>
See Evaluation Criteria - question 3e	<b>4</b>	<b>2</b>	<b>3</b>	<b>4</b>
See Evaluation Criteria - question 3f	<b>5</b>	<b>3</b>	<b>4</b>	<b>5</b>
See Evaluation Criteria - question 3g	<b>5</b>	<b>4</b>	<b>4</b>	<b>5</b>
<b>4. DATE WAREHOUSE</b> (Total Maximum of 10 Points)				
See Evaluation Criteria - question 4a	<b>10</b>	<b>7</b>	<b>5</b>	<b>10</b>
<b>5. QUESTIONNAIRE AND PERFORMANCE GUARANTEES</b> (Total Maximum of 20 Points)				
See Evaluation Criteria - question 5a	<b>10</b>	<b>10</b>	<b>10</b>	<b>10</b>
See Evaluation Criteria - question 5b	<b>10</b>	<b>10</b>	<b>10</b>	<b>10</b>
<b>6. PRICE POINTS ENTERED BY PURCHASING</b> (Total Maximum of 20 Points)			↙ ↘	
See Evaluation Criteria - question 6a	<b>12</b>	<b>12.00</b>	<sup>6.15</sup> <b>5.67</b>	<sup>5.67</sup> <b>6.15</b>
See Evaluation Criteria - question 6b	<b>8</b>	<b>7.36</b>	<sup>8.00</sup> <b>6.40</b>	<sup>6.40</sup> <b>8.00</b>
<b>TOTAL SCORE ENTERED BY PURCHASING</b>	100 One Hundred	<b>75.36</b>	<b>78.15</b>	<b>86.07</b>

**Kimm Campbell**


Name \_\_\_\_\_  
  
 Signature \_\_\_\_\_

By signing this document I certify that I have abided by the Code of Silence Ordinance and have not been influenced or coerced by anyone in the assignment of the points by me for this procurement.

ATC

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<b>1. LOCATION</b> (Total Maximum 5 Points)	<b>5</b>	5 <sup>3</sup> KBK	0 <sup>3</sup> KBK	0 <sup>5</sup> KBK
<b>2. COMPANY PROFILE, CHARACTERISTICS OF FIRM AND STAFFING</b> (Total Maximum 15 Points)				
See Evaluation Criteria - question 2a	5	2	5	5
See Evaluation Criteria - question 2b	5	5	5 <sup>3</sup> KBK	4 <sup>4</sup> KBK
See Evaluation Criteria - question 2c	5	3	5	5
<b>3. QUALITY OF SERVICE AND CUSTOMER SERVICE</b> (Total Maximum 30 Points)				
See Evaluation Criteria - question 3a	4	4	4	4
See Evaluation Criteria - question 3b	4	3	3	4
See Evaluation Criteria - question 3c	4	4	4	3 <sup>3</sup> KBK
See Evaluation Criteria - question 3d	4	3	4	4
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<b>4. DATE WAREHOUSE</b> (Total Maximum of 10 Points)				
See Evaluation Criteria - question 4a	10	8	5	8
<b>5. QUESTIONNAIRE AND PERFORMANCE GUARANTEES</b> (Total Maximum of 20 Points)				
See Evaluation Criteria - question 5a	10	8	8	8
See Evaluation Criteria - question 5b	10	10	10	10
<b>6. PRICE POINTS ENTERED BY PURCHASING</b> (Total Maximum of 20 Points)				
See Evaluation Criteria - question 6a	12	12.00	6.15 <del>5.67</del>	5.67 <del>6.15</del>
See Evaluation Criteria - question 6b	8	7.36	8.00 <del>6.40</del>	6.40 <del>8.00</del>
<b>TOTAL SCORE ENTERED BY PURCHASING</b>	100 One Hundred	82.36	75.07	80.15
			75.15	78.07
Name	<b>Kevin Kelleher</b>			
Signature				

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