



Fulton County Board of Commissioners  
**Agenda Item Summary**

**# 20-0222**

**BOC Meeting Date**  
3/18/2020

**Requesting Agency**

Finance

**Commission Districts Affected**

All Districts

**Requested Action** *(Identify appropriate Action or Motion, purpose, cost, timeframe, etc.)*

Request approval of recommended proposal – Finance Department, RFP #19RFP10172019C-BKJ, Healthcare Benefit Consulting Services in the amount of \$195,568.00 with Segal Consulting to provide Benefits Consulting Services (including: premium rate development, healthcare budget, claims analysis, plan design/cost share analysis, education/training, regulatory compliance, technical assistance) for the County's Medical, Dental and Vision programs. Effective upon execution of contract through December 31, 2020, with two renewal options.

**Requirement for Board Action** *(Cite specific Board policy, statute or code requirement)*

In accordance with State of Georgia O.C.G.A. §36-10-1, requests for approval of contractual agreements shall be forwarded to the Board of Commissioners for approval.

**Is this Item related to a Strategic Priority Area?** *(If yes, note strategic priority area below)*

Yes                      All People Trust Government is Effective, Efficient and Fiscally Sound Open and Responsible Government

**Is this a purchasing item?**

Yes

**Summary & Background**

*(First sentence includes Agency recommendation. Provide an executive summary of the action that gives an overview of the relevant details for the item.)*

**Scope of Work:** The Finance Department requests approval of recommended proposal for Segal to provide healthcare benefits consulting services. This contract will provide professional healthcare consulting services including: premium rate development benefit analysis, financial analysis, review of plan documents for compliance, claims analysis, cost projections, plan design/cost share recommendations and associated estimated savings, determine annual healthcare budget, draft healthcare benefits Request for Proposal (RFP) specification and provide technical assistance, coordinate benefits education/training sessions, coordinate communication efforts, provide notification of regulatory requirements/changes, assist with statutory benefit forms and filings, and all other efforts needed to administer the County's medical, dental and vision self-insured and fully insured programs.

**Community Impact:** None

**Department Recommendation:** The Finance Department recommends approval of proposal for Segal Consulting to provide healthcare benefits consulting services.

Agency Director Approval		County Manager's Approval
Typed Name and Title Felicia Strong-Whitaker	Phone 404-612-5800	
Signature	Date	

Revised 03/12/09 (Previous versions are obsolete)

<b>Project Implications:</b> None	
<b>Community Issues/Concerns:</b> None	
<b>Department Issues/Concerns:</b> None	
<b>History of BOC Agenda Item:</b> This is a new Procurement	
<b>Contract Compliance Information</b>	<i>(Provide Contractor and Subcontractor details.)</i>

<b>Contract Value:</b>	<b>\$195,568.00</b>
<b>Prime Vendor:</b>	<b>Segal Consulting</b>
<b>Prime Status:</b>	<b>Non-Minority</b>
<b>Location:</b>	<b>Atlanta, GA</b>
<b>County:</b>	<b>Fulton County</b>
<b>Prime Value:</b>	<b>\$195,568.00 or 100.00%</b>
<b>Total Contract Value:</b>	<b>\$195,568.00 or 100.00%</b>
<b>Total M/FBE Value:</b>	<b>\$-0-</b>

<b>Solicitation Information</b>	<b>NON-MFBE</b>	<b>MBE</b>	<b>FBE</b>	<b>TOTAL</b>
No. Bid Notices Sent:	8	2	0	10
No. Bids Received:	4	1	0	5
<b>Total Contract Value</b>	\$195,568.00 or 100.00%			
<b>Total M/FBE Values</b>	\$0.00			
<b>Total Prime Value</b>	\$195,568.00 or 100.00%			
<b>Fiscal Impact / Funding Source</b> <i>(Include projected cost, approved budget amount and account number, source of funds, and any future funding requirements.)</i> 426-999-S200-1160: Group Insurance Stabilization, Non-Agency, Professional Services				
<b>Exhibits Attached</b> <i>(Provide copies of originals, number exhibits consecutively, and label all exhibits in the upper right corner.)</i> Exhibit 1: Evaluation Committee Recommendation Letter Exhibit 2: Contractor Performance Report				
<b>Source of Additional Information</b> <i>(Type Name, Title, Agency and Phone)</i> Ray Turner, Deputy Finance Director (404) 612-7737 or Melissa Barnett, Employee Benefits Manager (404) 612-4243.				

<b>Agency Director Approval</b>		<b>County Manager's Approval</b>
<b>Typed Name and Title</b> Felicia Strong-Whitaker	<b>Phone</b> 404-612-5800	
<b>Signature</b>	<b>Date</b>	

Revised 03/12/09 (Previous versions are obsolete)

**Procurement****Contract Attached:**  
No**Previous Contracts:**  
No**Solicitation Number:**  
19RFP10172019C-BKJ**Submitting Agency:**  
Finance**Staff Contact:**  
Ray Turner**Contact Phone:**  
404.612.7737**Description:** Healthcare Benefits Consulting Services**FINANCIAL SUMMARY****Total Contract Value: .**

Original Approved Amount: .

Previous Adjustments: .

This Request: \$195,568.00

TOTAL: \$195,568.00

**MBE/FBE Participation:**

Amount: . %: .

Amount: . %: .

Amount: . \$0.00 0.00%: .

Amount: . %: .

**Grant Information Summary:**

Amount Requested: .

Match Required: .

Start Date: .

End Date: .

Match Account \$: .

☐

Cash

☐

In-Kind

☐

Approval to Award

☐

Apply &amp; Accept

**Funding Line 1:**

426-999-S200-1160

**Funding Line 2:**

.

**Funding Line 3:**

.

**Funding Line 4:**

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**KEY CONTRACT TERMS****Start Date:**

1/1/2020

**End Date:**

12/31/2020

**Cost Adjustment:**

.

**Renewal/Extension Terms:**

.

**ROUTING & APPROVALS**

(Do not edit below this line)

X	Originating Department:	Turner, Ray	Date: 2/4/2020
X	County Attorney:	Ringer, Cheryl	Date: 2/27/2020
X	Purchasing/Contract Compliance:	Strong-Whitaker, Felicia	Date: 3/9/2020
X	Finance/Budget Analyst/Grants Admin:	Jones, Monica	Date: 2/4/2020
.	Grants Management:	.	Date: .
X	County Manager:	Anderson, Dick	Date: 3/9/2020



## INTEROFFICE MEMORANDUM

**TO:** Felicia Strong-Whitaker, Director  
Department of Purchasing & Contract Compliance

**FROM:** Evaluation Committee Recommendation Letter

**DATE:** January 3, 2020

**PROJECT:** 19RFP10172019C-BKJ, Healthcare Benefits Consulting Services

In accordance with the Purchasing Code, a duly appointed Evaluation Committee has reviewed the proposals submitted in response to the above-reference project on behalf of the Finance Department.

Five (5) qualified firms submitted proposals for evaluation and consideration for award of this project:

1. NFP Corporate Services, Inc.
2. CBIZ
3. Benalytics Consulting Group, LLC
4. Segal Consulting
5. USI Insurance Services

After review, evaluation and consideration of all available information related to the requirements and evaluation criteria of the RFP, the Evaluation Committee has determined that the proposal submitted by **Segal Consulting** with a total score of **86.23**, is the recommended vendor for the award of #19RFP10172019C-BKJ, Healthcare Benefits Consulting Services.

January 3, 2020

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The Evaluation Committee members attest that each member scored each proposal independently in accordance with the evaluation criteria set forth in the Request for Proposal and that their individual score is a part of the final scores in the attached Evaluation Matrix.

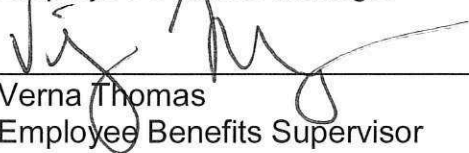
**SELECTION COMMITTEE MEMBERS:**



Ray Turner  
Deputy Director



Melissa Barnett  
Employee Benefits Manager



Verna Thomas  
Employee Benefits Supervisor

EVALUATION CRITERIA	WEIGHT	NFP CORPORATE SERVICES, INC.	CBIZ	BENALYTICS CONSULTING GROUP, LLC	SEGAL CONSULTING	USI INSURANCE SERVICES
Project Plan/Approach to Work	25%	12.50%	14.58%	12.50%	25.00%	16.67%
Qualifications of Key Personnel	20%	15.00%	15.00%	13.33%	20.00%	15.00%
Relevant Project Experience/Past Exp.	20%	13.33%	11.67%	6.67%	20.00%	11.67%
Availability of Key Personnel	18%	9.00%	9.00%	13.50%	16.50%	12.00%
Local Preference	5%	0.00%	0.00%	0.00%	0.00%	0.00%
Service Disabled Veterans Preference	2%	0.00%	0.00%	0.00%	0.00%	0.00%
<b>**Total Technical Scores**</b>		49.83%	50.25%	46.00%	81.50%	55.33%
Cost	10%	9.25%	6.17%	10.00%	4.73%	1.94%
<b>TOTAL SCORE:</b>	<b>100%</b>	<b>59.08%</b>	<b>56.42%</b>	<b>56.00%</b>	<b>86.23%</b>	<b>57.28%</b>



## DEPARTMENT OF PURCHASING &amp; CONTRACT COMPLIANCE

CONTRACTORS PERFORMANCE REPORT  
PROFESSIONAL SERVICES

Report Period Start	Report Period End		Contract Period Start	Contract Period End
3/1/2015	6/30/2015		1/1/2015	12/31/2015
PO Number			PO Date	
15SC96143C-MT			1/28/2015	
Department	FINANCE			
Bld Number	15RFP62986C-MT			
Service Commodity	PROFESSIONAL SERVICES			
Contractor	The Segal Company			

- 0 = Unsatisfactory      *Achieves contract requirements less than 50% of the time, not responsive, effective and/or efficient, unacceptable delay, incompetence, high degree of customer dissatisfaction.*
- 1 = Poor      *Achieves contract requirements 70% of the time. Marginally responsive, effective and/or efficient; delays require significant adjustments to programs; key employees marginally capable; customers somewhat satisfied.*
- 2 = Satisfactory      *Achieves contract requirements 80% of the time; generally responsive, effective and/or efficient; delays are excusable and/or results in minor programs adjustments; employees are capable and satisfactorily providing service without intervention; customers indicate satisfaction.*
- 3 = Good      *Achieves contract requirements 90% of the time. Usually responsive; effective and/or efficient; delays have not impact on programs/mission; key employees are highly competent and seldom require guidance; customers are highly satisfied.*
- 4 = Excellent      *Achieves contract requirements 100% of the time. Immediately responsive; highly efficient and/or effective; no delays; key employees are experts and require minimal directions; customers expectations are exceeded.*

## 1. Quality of Goods/Services (-Specification Compliance - Technical Excellence - Reports/Administration - Personnel Qualification)

- Comments:
- ☐ 0
- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- In the 1st six month of this contract term, contractor has assigned qualified personnel to work with staff in full compliance of specifications. Contractor was always available to provide information on status of work. Contractor provided summarized information as requested and was available to meet with staff as requested. Contractor assisted with RFP development for medical, dental, vision for plan year effective 1/1/2016.

## 2. Timeliness of Performance (-Were Milestones Met Per Contract - Response Time (per agreement, if applicable) - Responsiveness to Direction/Change - On Time Completion Per Contract)

- Comments:
- ☐ 0
- ☐ 1
- ☐ 2
- ☒ 3
- ☐ 4
- Contractor has responded in time and was able to meet timelines. Very responsive to directions and delivery.

## 3. Business Relations (-Responsiveness to Inquiries - Prompt Problem Notifications)

- Comments:
- ☐ 0
- ☐ 1
- ☐ 2
- ☒ 3
- ☐ 4
- Good relationship with staff. Always kept in touch with staff as well as other benefit vendors to provide very good benefit consultant product.

## 4. Customer Satisfaction (-Met User Quality Expectations - Met Specification - Within Budget - Proper Invoicing - No Substitutions)

- Comments:
- ☐ 0



- ☐ 1  
☐ 2  
☒ 3  
☐ 4

Met user satisfaction in most cases. Timely invoicing, within budget with all supporting documents, timely receipt of deliverables and attended meetings.

5. Contractors Key Personnel (-Credentials/Experience Appropriate - Effective Supervision/Management - Available as Needed)

- ☐ 0  
☐ 1  
☐ 2  
☒ 3  
☐ 4

Comments:

Contractor had personnel available who were capable of handling the work and the information relating to the work. Backup was available when the primary representative was not and the staff was willing to accomodate emergency requests.

Overall Performance Rating:	3.2		
Would you select/recommend this vendor again? (Check box for Yes. Leave Blank for No)		Rating completed by:	Anthony.Muhammad
<input checked="" type="radio"/> Yes <input type="radio"/> No			
Department Head Name	Department Head Signature		Date
HAKSEM OSHIKOYA			8/28/2015