

REQUEST FOR PROPOSALS

Notice is hereby given that the Board of County Commissioners of Sumter County, Florida, will be receiving proposals for the following:

"SUMTER COUNTY ACTUARIAL SERVICES"

Detailed proposals are available upon request by calling (352) 569-6067, by coming to the County Commissioners Office, Budget & Purchasing Department, Room 220, Sumter County Government Offices, 910 North Main Street, Bushnell, Florida, or by contacting Demand Star at 1-800-711-1712 or www.DemandStar.com.

All inquiries and questions regarding this RFP must be made only to the contact identified below and shall be made in writing by fax, e-mail, or mail:

Amanda Taylor, Budget & Purchasing Coordinator

Mailing Address: 910 N. Main Street, Suite 220

Bushnell, FL 33513

E-mail:

Amanda.Taylor@sumtercountyl.gov

Fax: (352) 793-0207

The deadline for submission of questions relating to the RFP shall be February 19, 2010 at 5:00 PM

Proposals must be received by the County no later than 10:00am, March 5, 2010. Late submittals will be rejected and returned unopened to the Proposer. Proposals must be firmly sealed in packaging that is clearly marked on the outside: "Board of Sumter County Commissioners Request for Proposal for Actuarial Services RFP 150-0-2010\AT". Sealed Proposals must be mailed or delivered to Mrs. Amanda Taylor, at the above address.

Upon submission, all Proposals become the property of the County, who has the right to use any or all ideas presented in any Proposal submitted in response to this RFP, whether or not the Proposal is accepted. Proposals will be opened immediately following the due date and time.

BOARD OF COUNTY
COMMISSIONERS
SUMTER COUNTY, FLORIDA

#213137 February 5, 2010

RFP 150-0-2010/AT Sumter County Actuarial Services bid opening meeting was held on Friday, March 5, 2010, at 10:00am in Room 142 located at the Government Offices, 910 North Main Street, Bushnell, FL 33513.

Amanda Taylor and Lita Hart were present to represent county staff.

Amanda stated four packets were received on time and one packet was received late. The late packet was from Bolton Partners, Inc. The packet will be returned or disposed of after Amanda contacts the company.

Amanda stated the meetings to be held for this bid are as follows: 3/8/2010 at 2 pm in the Supervisor of Elections (SOE) conference room the Selection Committee will meet to short list the proposals. 3/10/2010 at 2pm in Room 142 the Selection Committee would meet to hold vendor presentations and a final scoring of the proposals. 3/23/2010 the recommendation of the Selection Committee would go to the Sumter County Board of County Commissioners.

Amanda stated the proposals should contain the following: 1 original packet, 5 copies, 1 electronic version and proper acknowledgement of Addendum 1. Amanda stated the packets were not being opened in any particular order.

- 1) Willis of FL – all packets included, proper acknowledgement of Addendum 1, base price listed as \$17,500.00 with separate single hourly rates listed.
- 2) Milliman – all packets included, Addendum 1 was not properly acknowledged, base price listed as \$24,000.00 with separate single hourly rates listed.
- 3) Wakely Consulting Group – all packets included, proper acknowledgement of Addendum 1, base price is listed as \$27,400.00 with separate single hourly rates listed.
- 4) Stanley, Hunt, DuFree & Rhine a division of BB&T – all packets included, proper acknowledgement of Addendum 1, base price listed as \$22,700.00 with separate single hourly rates listed.

The meeting adjourned at 10:21am.

RFP 150-0-2010/AT Sumter County Actuarial Services Selection Review Committee meeting held on 3-8-2010 at 2:00pm in the Supervisor of Elections Conference Room, located at the Government Offices, 910 North Main Street, Bushnell, FL 33513.

Bradley Arnold, Sandra Howell, Lita Hart, John Lege, Art Bisner, and Amanda Taylor were present to represent County staff.

The Selection Committee discussed and scored the proposals as follows:

Milliman 20.90 points

Wakely Consulting Group 17.50 points

Stanley, Hunt, DuPree & Rhine 17.15 points

Willis of FL – 14.24 points

Brad asked Amanda to verify Milliman's references and they would be reviewed at the Selection Committee meeting on 3-10-2010. The Selection Committee also agreed that vendor presentations would not be held. Amanda would contact the companies to let them know this was cancelled.

The meeting adjourned at 2:20pm.

RFP 150-0-2010/AT Sumter County Actuarial Services Selection Review Committee meeting held on 3-10-2010 a 2:00pm in Room 142, located at the Government Offices, 910 North Main Street, Bushnell, FL 33513.

Bradley Arnold, Sandra Howell, Lita Hart, John Lege, Art Bisner, and Amanda Taylor were present to represent County staff.

Amanda stated the reference checks for Milliman all came back with positive feedback.

Bradley made a motion to recommend Milliman to the Sumter County Board of County Commissioners on 3-23-2010 to enter into contract negotiations. Negotiations will be designated to Lita and Sandra.

The meeting adjourned at 2:08pm.

Milliman Reference Check Information

Putnam County – email from John Jones to John Lege stating they were very pleased with the services Milliman provided, used them for GASB 45 only

Escambia County – spoke with Patty, she stated the initial meeting was good; she did have to email several times but in the end was pleased with their services, used them for GASB 45 only

Jacksonville Aviation – spoke with Diane, she stated they were very pleased with their services and the representative from Milliman that was dedicated to their agency, used them for GASB 45 only

Bay County – spoke with Linda, she stated they were very pleased with their services and the timelines of completion, used them for GASB 45 only

Santa Rosa – left two messages with a Marilyn Brown but we never connected, in the proposal they provided the GASB 45 reporting only

Marilyn called – contact person was great and responded back promptly, no real complaints, the price they quoted was less when the final bill came in because of only gathering a small amount of information that what was originally thought, used them for GASB 45 only

Flagler County – sent two emails and left one phone message, never received a response back

Phoned Milliman to ask them for agencies they provide Chap 112 and RDS reporting for, their response is as follows: “A recent 112.08 filing has been done for Flagler County.

Regarding RDS work, Milliman has been doing the State of Florida's RDS work annually.”

**PART 2
EVALUATION AND AWARD**

PROPOSAL EVALUATION

WAKELY

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	Score	X	Weight	=	Rating
1. Professional qualifications, capability, and availability of professional staff	<u>5.0</u>		<u>.25</u>		<u>1.25</u>
2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	<u>3.20</u>		<u>.25</u>		<u>.80</u>
3. Completeness and responsiveness to proposal	<u>3.0</u>		<u>.15</u>		<u>.45</u>
4. Work plan and time schedule	<u>3.0</u>		<u>.20</u>		<u>.60</u>
5. Reasonableness of cost in relationship to service	<u>4.0</u>		<u>.15</u>		<u>.60</u>

SCORE:

- 0 = Non-Responsive
- 1 = Poor
- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

3.7

AT

Do not attempt to contact any Selection Committee Member, staff member or person other than Mrs. Amanda Taylor for questions relating to this project. Anyone attempting to lobby Sumter County BOCC representatives may be disqualified. The Selection Committee Members shall be: Bradley Arnold, County Administrator, Sandra Howell, Assistant County Administrator, Lita Hart, Risk Manager, Art Bisner, Budget & Purchasing Manager, and John Lege, Finance Director.

Recommendation of award will be sent to all submitting vendors. The award will be based on the proposal that is most advantageous to Sumter County. All Selection Committee recommendations are subject to Board approval.

The Selection Committee will meet to evaluate proposals in the Supervisor of Elections Conference Room located at 910 North Main Street, Bushnell, FL 33513 at 2:00pm.

Wakely
ZAH

PART 2 EVALUATION AND AWARD

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1. Professional qualifications, capability, and availability of professional staff	<u>5</u>		<u>.25</u>		<u>1.25</u>
2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	<u>4</u>		<u>.25</u>		<u>1</u>
3. Completeness and responsiveness to proposal	<u>3</u>		<u>.15</u>		1.05 <u>.45</u>
4. Work plan and time schedule	<u>4</u>		<u>.20</u>		<u>.8</u>
5. Reasonableness of cost in relationship to service	<u>4</u>		<u>.15</u>		<u>.6</u>

4.10

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WILLEY CONSULTING

2/20/11

**PART 2
EVALUATION AND AWARD**

INCLUDES
ELECTRONIC FILING
OK FOR SUBMITTERS WITH OFFICE OF INT. AFS

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	Score	X Weight	= Rating	Notes
1. Professional qualifications, capability, and availability of professional staff	4	.25	1.00	NOTES: BCBS PLAN UNDER REVIEW ORAL SUGGESTION 10 YRS w/ SUMTER * J.L. GASTON'S ASS. OPISA
2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	3	.25	.75	FORM → FIRM NOT INCLUDED → STATE OF FL LIC. NOT INCLUDED
3. Completeness and responsiveness to proposal	2	.15	.30	3 SIMILAR → MANATEE → SARASOTA → LEESBURG
4. Work plan and time schedule	3	.20	.60	VS. 11/14
5. Reasonableness of cost in relationship to service	2	.15	.30	COST → \$27,400

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WAKUDA VS. J.L. GASTON on ISSUE A OPISA
→ 19 GASB 45 + 10 OPIS PRIOR TO 4/3/11
= 2.95

* NO CLEAR RESPONSE IF PLAN IS FUNDED (B6)
→ 100% HEALTH CARE CONSULTED
C3 - VAGUE RESPONSE / UNREASONABLE LIMITED DUTY (3MO)

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John Lege

WAKELY

**PART 2
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	Score	X	Weight	=	Rating
1. Professional qualifications, capability, and availability of professional staff	<u>3</u>		<u>.25</u>		<u>.75</u>
2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	<u>3</u>		<u>.25</u>		<u>.75</u>
3. Completeness and responsiveness to proposal	<u>3</u>		<u>.15</u>		<u>.45</u>
4. Work plan and time schedule	<u>3</u>		<u>.20</u>		<u>.60</u>
5. Reasonableness of cost in relationship to service	<u>3</u>		<u>.15</u>		<u>.45</u>

3.0

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*Wakely
Sandra Howell*

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1. Professional qualifications, capability, and availability of professional staff	<u>4</u>		<u>.25</u>		<u>1.00</u>
2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	<u>4</u>		<u>.25</u>		<u>1.00</u>
3. Completeness and responsiveness to proposal	<u>2</u>		<u>.15</u>		<u>.30</u>
4. Work plan and time schedule	<u>5</u>		<u>.20</u>		<u>1.00</u>
5. Reasonableness of cost in relationship to service	<u>3</u>		<u>.15</u>		<u>.45</u>

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*M. Hillman
Sandra Howell*

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1. Professional qualifications, capability, and availability of professional staff	<u>5</u>		<u>.25</u>		<u>1.25</u>
2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	<u>5</u>		<u>.25</u>		<u>1.25</u>
3. Completeness and responsiveness to proposal	<u>4</u>		<u>.15</u>		<u>1.60</u>
4. Work plan and time schedule	<u>5</u>		<u>.20</u>		<u>1.00</u>
5. Reasonableness of cost in relationship to service	<u>3</u>		<u>.15</u>		<u>.45</u>

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John Lege

M. Hillman

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2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	<u>4</u>		<u>.25</u>		<u>1.0</u>
3. Completeness and responsiveness to proposal	<u>4</u>		<u>.15</u>		<u>.60</u>
4. Work plan and time schedule	<u>4</u>		<u>.20</u>		<u>.80</u>
5. Reasonableness of cost in relationship to service	4 <u>3</u>		<u>.15</u>		<u>.45</u>
					4.10

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MELVINIAN
BOB

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1. Professional qualifications, capability, and availability of professional staff	<u>5</u>		<u>.25</u>		<u>1.25</u>	INFO! CLEAREST!
2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	<u>4</u>		<u>.25</u>		<u>1.00</u>	Q19 MTO W/ CLEAREST DETAILS = USEFUL 12/14 6-8 WIKES
3. Completeness and responsiveness to proposal	<u>5</u>		<u>.15</u>		<u>1.25</u>	
4. Work plan and time schedule	<u>5</u>		<u>.20</u>		<u>1.00</u>	
5. Reasonableness of cost in relationship to service	<u>3</u>		<u>.15</u>		<u>.30</u>	24,000
SCORE:	SERVICES PROVIDED OUT OF ATLANTA OFFICE. ✓					
0 = Non-Responsive	No SUBS = 4.8					
1 = Poor	DRAFT CONTRACT SUBMITTED					
2 = Fair	INSURANCE ✓					
3 = Average (Included only minimum of what was asked for on subject criteria)	BG ✓					
4 = Good						
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Milliman
LST

PART 2 EVALUATION AND AWARD

PROPOSAL EVALUATION

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1. Professional qualifications, capability, and availability of professional staff	<u>4</u>		<u>.25</u>		<u>1</u>
2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	<u>3</u>		<u>.25</u>		<u>.75</u>
3. Completeness and responsiveness to proposal	<u>4</u>		<u>.15</u>		<u>.6</u>
4. Work plan and time schedule	<u>4</u>		<u>.20</u>		<u>.8</u>
5. Reasonableness of cost in relationship to service	<u>4</u>		<u>.15</u>		<u>.6</u>

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**PART 2
EVALUATION AND AWARD**

PROPOSAL EVALUATION

Milliman

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2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	<u>3.6</u>		<u>.25</u>		<u>.90</u>
3. Completeness and responsiveness to proposal	<u>4.0</u>		<u>.15</u>		<u>.60</u>
4. Work plan and time schedule	<u>2.0</u>		<u>.20</u>		<u>.40</u>
5. Reasonableness of cost in relationship to service	<u>3.7</u>		<u>.15</u>		<u>.55</u>

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**PART 2
EVALUATION AND AWARD**

PROPOSAL EVALUATION

Willis

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	Score	X	Weight	=	Rating
1. Professional qualifications, capability, and availability of professional staff	<u>1.76</u>		<u>.25</u>		<u>.44</u>
2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	<u>1</u>		<u>.25</u>		<u>.25</u>
3. Completeness and responsiveness to proposal	<u>4</u>		<u>.15</u>		<u>.6</u>
4. Work plan and time schedule	<u>1</u>		<u>.20</u>		<u>.20</u>
5. Reasonableness of cost in relationship to service	<u>2</u>		<u>.15</u>		<u>.30</u>

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1.19

AS

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Willis
JH

PART 2 EVALUATION AND AWARD

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	Score	X	Weight	=	Rating
1. Professional qualifications, capability, and availability of professional staff	<u>4</u>		<u>.25</u>		<u>1</u>
2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	<u>3</u>		<u>.25</u>		<u>.75</u>
3. Completeness and responsiveness to proposal	<u>3</u>		<u>.15</u>		<u>.45</u>
4. Work plan and time schedule	<u>3</u>		<u>.20</u>		<u>.6</u>
5. Reasonableness of cost in relationship to service	<u>5</u>		<u>.15</u>		<u>.75</u>

3.55

SCORE:

- 0 = Non-Responsive
- 1 = Poor
- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

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The Selection Committee will meet to evaluate proposals in the Supervisor of Elections Conference Room located at 910 North Main Street, Bushnell, FL 33513 at 2:00pm.

WILLIS

BOA

**PART 2
EVALUATION AND AWARD**

PROPOSAL EVALUATION

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	Score	X Weight	= Rating	
1. Professional qualifications, capability, and availability of professional staff	<u>3</u>	<u>.25</u>	<u>.75</u>	BOYNTON BEACH SCHOOL BOARD LOUZA COLLEGE COUNSEL LIVES COUNTY
2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	<u>3</u>	<u>.25</u>	<u>.75</u>	
3. Completeness and responsiveness to proposal	<u>Ø</u>	<u>.15</u>	<u>Ø</u>	
4. Work plan and time schedule	<u>Ø</u>	<u>.20</u>	<u>Ø</u>	
5. Reasonableness of cost in relationship to service	<u>4</u>	<u>.15</u>	<u>.60</u>	

\$17,500

SCORE:

- 0 = Non-Responsive
- 1 = Poor
- 2 = Fair
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- 5 = Excellent

2.10

*NO SUBSTITUTIONS
STATEMENT OF INSURANCE
DID NOT LIST CLIENTS LOST LAST FIVE YEARS*

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05 = Poor 06 = Poor

C1 = A LOT BUT ANSWER
C2 = Non Responsive

John Leg

Willis

**PART 2
EVALUATION AND AWARD**

PROPOSAL EVALUATION

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	Score	X	Weight	=	Rating
1. Professional qualifications, capability, and availability of professional staff	<u>4</u>		<u>.25</u>		<u>1.0</u>
2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	<u>4</u>		<u>.25</u>		<u>1.0</u>
3. Completeness and responsiveness to proposal	<u>2</u>		<u>.15</u>		<u>.3</u>
4. Work plan and time schedule	<u>3</u>		<u>.20</u>		<u>.6</u>
5. Reasonableness of cost in relationship to service	<u>3</u>		<u>.15</u>		<u>.45</u>

3.35

SCORE:

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Willis
Sandra Howell

**PART 2
EVALUATION AND AWARD**

PROPOSAL EVALUATION

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	Score	X	Weight	=	Rating
1. Professional qualifications, capability, and availability of professional staff	<u>4</u>		<u>.25</u>		<u>1.00</u>
2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	<u>4</u>		<u>.25</u>		<u>1.00</u>
3. Completeness and responsiveness to proposal	<u>2</u>		<u>.15</u>		<u>.30</u>
4. Work plan and time schedule	<u>5</u>		<u>.20</u>		<u>1.00</u>
5. Reasonableness of cost in relationship to service	<u>5</u>		<u>.15</u>		<u>.75</u>

SCORE:

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1 = Poor

2 = Fair

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5 = Excellent

4.05

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SHDR
Sandra Howell

**PART 2
EVALUATION AND AWARD**

PROPOSAL EVALUATION

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1. Professional qualifications, capability, and availability of professional staff	<u>3</u>		<u>.25</u>		<u>.75</u>
2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	<u>2</u>		<u>.25</u>		<u>.50</u>
3. Completeness and responsiveness to proposal	<u>3</u>		<u>.15</u>		<u>.45</u>
4. Work plan and time schedule	<u>5</u>		<u>.20</u>		<u>1.00</u>
5. Reasonableness of cost in relationship to service	<u>4</u>		<u>.15</u>		<u>.60</u>

SCORE: 3.30

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- 2 = Fair
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John Lege

SHDR

**PART 2
EVALUATION AND AWARD**

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2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	<u>4</u>		<u>.25</u>		<u>1.0</u>
3. Completeness and responsiveness to proposal	<u>3</u>		<u>.15</u>		<u>.45</u>
4. Work plan and time schedule	<u>4</u>		<u>.20</u>		<u>.80</u>
5. Reasonableness of cost in relationship to service	<u>3</u>		<u>.15</u>		<u>.45</u>

3.45

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SHORE
B3A

**PART 2
EVALUATION AND AWARD**

PROPOSAL EVALUATION

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3. Completeness and responsiveness to proposal	<u>4</u>	<u>.15</u>	<u>.60</u>
4. Work plan and time schedule	<u>3</u>	<u>.20</u>	<u>.60</u>
5. Reasonableness of cost in relationship to service	<u>3</u>	<u>.15</u>	<u>.30</u>

RECOMMENDATION
PROPOSAL
SUBMITTERS
 TOTAL 130-100GAS 15-3
 DICK & SCOTT
 LANE WEST
 5 EN FL

= 3.50
22,700

SCORE:

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MODGIS PROPRIETARY
SYNDI'S, INC. SUB
QUAL STANDARDS & ACTUARIAL STANDARDS
5-16 YRS TO SUPPORT TRUST
10-12 WEEKS FOLLOWING DATA (2-3 MO)

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C3 MODEL AND PART D
PRO VAL - SOFTWARE
ENTERING NORMAL
TEMPORARY
1% HEALTH CARE CONSULTERS

SHDR
RA

**PART 2
EVALUATION AND AWARD**

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3. Completeness and responsiveness to proposal	<u>3</u>		<u>.15</u>		<u>.45</u>
4. Work plan and time schedule	<u>4</u>		<u>.20</u>		<u>.8</u>
5. Reasonableness of cost in relationship to service	<u>4</u>		<u>.15</u>		<u>.6</u>
					<u>3.6</u>

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**PART 2
EVALUATION AND AWARD**

SHDR

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2. Proposer's past performance in terms of demonstrated knowledge and experience on similar accounts	<u>4</u>		.25		<u>1</u>
3. Completeness and responsiveness to proposal	<u>3</u>		.15		<u>.45</u>
4. Work plan and time schedule	<u>2</u>		.20		<u>.40</u>
5. Reasonableness of cost in relationship to service	<u>3</u>		.15		<u>.45</u>

SCORE:

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3.3

AS

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