

Employee Health Benefits Consultant Services
Summary of Response to RFP

Evaluation Criteria:

<p>Directly Related Experience:</p>	<ul style="list-style-type: none"> • <u>State of Montana</u> (2015-present): 14,000 employees/retirees; provided assistance with various bid projects, as well as ongoing evaluation of point solutions and savings opportunities; ongoing assistance with data analytics. • <u>University of California SHIP</u> (Aug. 2012 – present): 125,000 participants; restructured the program, set premiums to cover projected claims and expenses, implemented a reporting system to track utilization. • <u>City of Long Beach</u> (July 2006-present): 8,000 active employees/2,000 retirees; reviewed funding options; restructured the medical plans. • <u>California Assoc. of Highway Patrolmen</u> (1989 – present); 10,000 + covered employees and retirees; 31 years of ongoing benefit consulting services and special projects; established annual rate-setting methodology for self-funded plan; developed forecasting model; assisted in development of reserve balance investment policy. • <i>See also Case Study Samples, 7th blue divider sheet of proposal.</i>
<p>Price:</p>	<p><u>Total Max Bid:</u> \$715,000</p> <p><i>See attached Official Proposal Price Sheet and Price Comparison Table.</i></p> <p><i>See also pricing breakdown, 5th blue divider sheet of proposal.</i></p>
<p>Plan/Schedule:</p>	<p><u>Plan:</u></p> <ul style="list-style-type: none"> • Step 1: Strategy and Planning • Step 2: Benchmarking, Design & Analysis • Step 3: Strategic Roadmap • Step 4: Vendor Management

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	<ul style="list-style-type: none"> • Step 5: Implementation and Ongoing Monitoring • <i>See</i> further explanation of the steps at pp. 7-8 of proposal (4th blue divider sheet). <p><u>Schedule:</u></p> <ul style="list-style-type: none"> • Working Project Timeline, 5th blue divider sheet of proposal. • <i>See also</i> explanation of project management, pp. 17-18 of proposal (4th blue divider sheet).
Availability:	<ul style="list-style-type: none"> • Offices located in Chesterfield, Missouri • Available to meet by phone, web conference or in person as often as necessary during the project, p. 12 RFP response (2nd blue divider sheet)
Personnel:	<ul style="list-style-type: none"> • Lori Nilson, First Vice President – Lead Consultant • Tony Garavaglia – Executive Consultant • Kriste Martin – Education Specialist Consultant • Kelsey Hartman – Public Sector Specialist, Account Manager • <i>See</i> Organizational Chart, 6th blue divider sheet of proposal. • <i>See also</i> Team Bios, pp. 20-25 of proposal (4th blue divider sheet).
Past Performance:	<ul style="list-style-type: none"> • Founded in 1925, 9th largest employee benefits firm in the U.S., p. 17 RFP response (2nd blue divider sheet) • <i>See</i> Work Samples provided (attached to proposal). • <i>See also</i> attached References List and References Table
Compliance with RFP Requirements:	See Attached Checklist.
Subcontractors:	None listed.