

**Employee Health Benefits Consultant Services**  
**Summary of Response to RFP**

**Evaluation Criteria:**

<b>Directly Related Experience:</b>	<p>Gallagher lists 3 comparable contracts at Tab 2, § 5.5 of the proposal, as follows:</p> <ul style="list-style-type: none"><li>• <u>Austin Independent School District</u>: (2015 – present) Gallagher was brought on to revamp the AISD health program; Gallagher currently negotiates, audits, and administers the health program.</li><li>• <u>City of San Antonio</u>: (? – present) Gallagher hired to market and analyze the medical and pharmacy plan for the city; recently renewed contract with the city for an add'l 3 years.</li><li>• <u>Tarrant County</u>: (no dates given) charged with bidding all coverages for the county, which is part of the Public Employee Benefit Cooperative; Gallagher reviewed product offerings, discounts, pharmacy rebates, and reinsurance costs, to find cost savings while keeping plan designs and employee contributions the same.</li></ul>
<b>Price:</b>	<p><u>Total Max Bid</u>: \$175,000</p> <p><i>See attached Official Proposal Price Sheet and Price Comparison Table.</i></p>
<b>Plan/Schedule:</b>	<p><u>Plan</u>:</p> <ul style="list-style-type: none"><li>• Step 1: Discovery</li><li>• Step 2: Desired State and Goal Setting</li><li>• Step 3: Gaps and Opportunities Analysis</li><li>• Step 4: Strategic and Tactical Options Evaluation</li><li>• Step 5: Implementation and Ongoing Management</li></ul> <p><i>See 5-Step Plan, Executive Summary, § 5.4 of proposal (Tab 2).</i></p> <p><i>See also Tab 2, § 5.5 of proposal, which discusses annual client service plan and project timelines.</i></p>

**Gallagher (Cont'd)**

	<p><u>Schedule:</u></p> <ul style="list-style-type: none"> <li>• Estimate 3 months to complete the work, Tab 2 § 5.5 of proposal.</li> </ul>
<b>Availability:</b>	<ul style="list-style-type: none"> <li>• Team located in Little Rock, AR and Austin, TX</li> <li>• Available for meeting in person as needed</li> <li>• States “workload and schedule will allow [the team] to be fully available to meet your needs.”</li> </ul> <p><i>See</i> Tab 1 of proposal.</p>
<b>Personnel:</b>	<ul style="list-style-type: none"> <li>• Nick Long, Sr. Benefit Consultant, Area Vice-President</li> <li>• Chris Newell, Area Vice-President</li> <li>• Ron Novak, Consultant, Area Vice-President</li> <li>• Tim Brown, Benefits Consultant</li> <li>• <i>See</i> Org. Chart, Tab 2, § 5.5 of proposal.</li> <li>• <i>See also</i> Professional Experience – Resumes, Tab 5 of proposal.</li> </ul>
<b>Past Performance:</b>	<p>Founded in 1927, has provided brokerage and consulting services since its benefits division was founded in 1961; and has contracts in all 50 states to provide the types of services requested by RFP, Tab 2 of proposal.</p> <ul style="list-style-type: none"> <li>• <i>See</i> References, Tab 2 of proposal.</li> <li>• <i>See also</i> attached References Table</li> <li>• <i>See also</i> Company History, Tab 5 of proposal.</li> </ul>
<b>Compliance with RFP Requirements:</b>	<i>See</i> Attached Checklist.
<b>Subcontractors:</b>	None listed.