

Tabulation of Submittals*

Purchasing Office Solicitation No.:	2019-007 (group employee insurance benefits consulting services)
Notice to proposers published in the <i>Williamson Herald</i> on:	1/31/19
Number of potential proposers that were notified of / that submitted a proposal in response to this request for proposals:	18 / 5
Date and time proposal due and publicly opened:	3/5/19 2:00 PM
Present at opening of proposals:	Meghan Guffee and Roxanne Sanders of Full Service Insurance; Todd Harrison of Willis Towers Watson; Ashley Peery, Sara Sylvis, Tracy Harness and Kevin Townsel of the City of Franklin HR Department; and Leslie Pewitt, Suzanne Ward and Brian Wilcox of the City of Franklin Purchasing Office
Target meeting of BOMA at which recommendation is scheduled to be considered:	5/14/19

Proposals received from:	Does the proposal include all required documents?	Does the proposal take any exceptions to the City's procurement solicitation? / If so, how many?	Average points allocated by proposal evaluation team (out of a possible 100, utilizing evaluation criteria as listed in RFP):	Average points allocated by interview panel (out of a possible 100, utilizing evaluation criteria as listed in RFP):	Total quoted annual fixed flat fee for completing all requirements in the Anticipated Scope of Services:	Payment terms:	Proposal is valid and may be accepted through:
CBIZ Benefits & Insurance Services, Inc. 12 Cadillac Drive Ste. 160 Brentwood, TN 37027 Jon Chaney, Employee Benefits Specialist 615/ 300-6906 jchaney@cbiz.com	No (Missing CoF Std T's & C's with vendor's contact info inserted)	Proposer takes no exceptions	64.25	not interviewed	\$45,000, plus 15% of any savings to the City	net 30 days	5/31/2019
Full Service Insurance, Inc. 903 Murfreesboro Road Franklin, TN 37064 Meghan Guffee, Vice President Employee Benefits 615/ 790-0990 mguffee@fullserviceins.com	Yes	Proposer takes no exceptions	72.75	not interviewed	\$50,000	net 30 days	7/31/2019
HUB International Gulf South 5110 Maryland Way, Suite 250 Brentwood, TN 37027 Aeron Lucas, Sr. Vice President 615-468-3211 aeron.lucas@hubinternational.com	Yes	Proposer takes no exceptions	85.50	83.00	\$42,000	net 30 days	7/1/2019
Sherrill Morgan 525 West 5th Street, Suite 310 Covington, KY 41011 Mark Morgan, President 859-291-6600 markm@sherrillmorgan.com	Yes	Proposer takes no exceptions	75.15	not interviewed	\$48,500	net 30 days	7/1/2019
Willis Towers Watson 26 Century Blvd. Nashville, TN 37214 Lou Diaz, Nashville Brokerage & Advisory Market Leader 615-872-3727 lou.diaz@willistowerswatson.com	Yes	Proposer takes no exceptions	87.25	89.25	\$56,000	net 30 days	6/1/2019

* Shaded submittal is the submittal scored highest by the interview team