

25-019 - Human Capital Management Services for HR

Scoring Summary

Active Submissions

| Supplier | Total / 100 pts | A - Purchasing / 0 pts | A-1 - Pass/Fail | B - Department / 100 pts | B-1 - Responsiveness / 10 pts | B-2 - Experience and Qualifications / 40 pts | B-3 - References / 10 pts | B-4 - Pricing / 40 pts |
|---|--------------------|---------------------------|--------------------|-----------------------------|-------------------------------------|--|------------------------------|---------------------------|
| CBIZ Benefits and Insurance Services, Inc | 91.25 | 0 | Pass | 91.25 | 10 | 40 | 10 | 31.25 |
| IMA Financial Corp | 70.5 | 0 | Pass | 70.5 | 5.25 | 25.5 | 10 | 29.75 |



25-019 - Human Capital Management Services for HR IMA Financial Corp

Scoring Summary

Evaluation Group 1 - Purchasing Evaluation

| Reviewer | A - Purchasing / 0 pts | A-1 - Pass/Fail |
|-------------------|---------------------------|--------------------|
| Barbara Casamento | 0 | Pass |
| | Average: | Pass |
| Calculated: | 0 | Pass |

Evaluation Group 2 - Department Evaluation

| Reviewer | Total / 100 pts | B - Department / 100 pts | B-1 - Responsiveness / 10 pts | B-2 - Experience and Qualifications / 40 pts | B-3 - References / 10 pts | B-4 - Pricing / 40 pts |
|---------------|--------------------|-----------------------------|----------------------------------|--|------------------------------|---------------------------|
| Carmen Hayes | 70 | 70 | 5 | 25 | 10 | 30 |
| Dianne Kimzey | 81 | 81 | 6 | 32 | 10 | 33 |
| Gina Campbell | 71 | 71 | 5 | 20 | 10 | 36 |
| Cindy Wallace | 60 | 60 | 5 | 25 | 10 | 20 |
| | | Average: | 5.25 | 25.5 | 10 | 29.75 |
| | | | ↓ | ↓ | ↓ | ↓ |
| Calculated: | 70.5 | 70.5 | 5.25 | 25.5 | 10 | 29.75 |



Scoring Comments

A-1 - Reviewer Scores

| Reviewer | Score | Reason | Comments |
|-------------------|-------|--------------------------|--|
| Barbara Casamento | Pass | Meets the requirement(s) | complete for the most part - Compliance Review Office may want to review CUP with Respondent |

B-1 - Responsiveness - Reviewer Scores

| Reviewer | Score | Reason | Comments |
|---------------|-------|------------------------------------|---|
| Carmen Hayes | 5 | Medium level of detail in response | MBE/WBE not listed and did not provide in the proposal responses to all requests in the RFP. |
| Dianne Kimzey | 6 | Partially meets my expectations | IMA's proposal was not as easy to follow as the other bidder. We had to reach out for additional clarification for their answers. The majority of the additional information was in their proposal, it just wasn't laid out as nice as the other bid. |
| Gina Campbell | 5 | Medium level of detail in response | My score is based on what was not included in their response to the RFP. Not all areas were responded to i.e. MBE/WBE. |
| Cindy Wallace | 5 | Partially fits desired attributes | The evaluating team had to reach out to them to better understand what services they were offering and even when we received additional response, those answers still didn't meet some of the questions posed in the RFP |



B-2 - Experience and Qualifications - Reviewer Scores

| Reviewer | Score | Reason | Comments |
|---------------|-------|------------------------------------|--|
| Carmen Hayes | 25 | Medium level of detail in response | Responses during interview were vague and not detailed. |
| Dianne Kimzey | 32 | Strongly fits desired attribute(s) | IMA's is a nationwide company with the experience in this line of work. The interview contained a few vague responses to our questions and they did not seem in sync between the VP in Denver and the KC team. They seem to have the experience to satisfy the scope but their delivery in the interview was not as in sync as the other bidder. |
| Gina Campbell | 20 | Partially fits desired attributes | My score is based on the vagueness in their original response AND the answers to our follow up questions. They did not secure my confidence as a potential partner. |
| Cindy Wallace | 25 | Partially meets my expectations | During the interviewing, when asking questions, sometimes there was hesitancy on what I felt IMA understood our service needs. I believe they are highly qualified in many categories but they address some of the human capital management component needs in a clear manner to my satisfaction |

B-3 - References - Reviewer Scores

| Reviewer | Score | Reason | Comments |
|---------------|-------|----------------------------------|---|
| Carmen Hayes | 10 | Meets or exceeds my expectations | Reference checks from clients they are doing business with were great. |
| Dianne Kimzey | 10 | Meets or exceeds my expectations | References checked out with positive comments. There were 2 companies that had a much larger number of employees than the county. |
| Gina Campbell | 10 | Meets or exceeds my expectations | My score is based on their references' positive feedback. |
| Cindy Wallace | 10 | Well-supported claim(s) | The references I was asked to check were excellent. |



B-4 - Pricing - Reviewer Scores

| Reviewer | Score | Reason | Comments |
|---------------|-------|------------------------------------|---|
| Carmen Hayes | 30 | Meets or exceeds my expectations | Pricing for MBE/WBE not provided in proposal and upon request from the Committee still was not provided. No way of determining in the proposal how much additional cost for services would actually be. |
| Dianne Kimzey | 33 | Other | IMA was the lowest priced proposal for the scope of services in the RFP. MBE percentages were provided but my review did not include an extensive review to determine whether they met the full requirement. |
| Gina Campbell | 36 | Strongly fits desired attribute(s) | My score is based on the \$85K they listed. However it appears to be suspiciously low. In our follow up I did not believe that we received all transparent cost details. I am lacking in confidence in the info submitted. |
| Cindy Wallace | 20 | Medium level of detail in response | Although IMA states a lower price on paper, they did not provide any detail nor breakdown by category. During the interview when pressed for answers about would there be any additional costs, they struggled to explain pricing structure and potential additional costs. |



25-019 - Human Capital Management Services for HR CBIZ Benefits and Insurance Services, Inc

Scoring Summary

Evaluation Group 1 - Purchasing Evaluation

| Reviewer | A - Purchasing / 0 pts | A-1 - Pass/Fail |
|-------------------|---------------------------|--------------------|
| Barbara Casamento | 0 | Pass |
| | Average: | Pass |
| Calculated: | 0 | ↓ Pass |

Evaluation Group 2 - Department Evaluation

| Reviewer | Total / 100 pts | B - Department / 100 pts | B-1 - Responsiveness / 10 pts | B-2 - Experience and Qualifications / 40 pts | B-3 - References / 10 pts | B-4 - Pricing / 40 pts |
|---------------|--------------------|-----------------------------|----------------------------------|--|------------------------------|---------------------------|
| Carmen Hayes | 90 | 90 | 10 | 40 | 10 | 30 |
| Dianne Kimzey | 80 | 80 | 10 | 40 | 10 | 20 |
| Gina Campbell | 95 | 95 | 10 | 40 | 10 | 35 |
| Cindy Wallace | 100 | 100 | 10 | 40 | 10 | 40 |
| | | Average: | 10 | 40 | 10 | 31.25 |
| Calculated: | 91.25 | 91.25 | ↓ 10 | ↓ 40 | ↓ 10 | ↓ 31.25 |



Scoring Comments

A-1 - Reviewer Scores

| Reviewer | Score | Reason | Comments |
|-------------------|-------|--------------------------|-------------------|
| Barbara Casamento | Pass | Meets the requirement(s) | complete proposal |

B-1 - Responsiveness - Reviewer Scores

| Reviewer | Score | Reason | Comments |
|---------------|-------|----------------------------------|---|
| Carmen Hayes | 10 | Meets or exceeds my expectations | Proposal to the RFP and responses were detailed and well documented |
| Dianne Kimzey | 10 | Meets or exceeds my expectations | Proposal was organized to answer all the scope questions to show how they would meet that item in the bid specs. Detailed and extremely easy to read. |
| Gina Campbell | 10 | Meets or exceeds my expectations | The response was clear, comprehensive, transparent and aligned with the RFP. |
| Cindy Wallace | 10 | High level of detail in response | CBIZ explained all in great detail and was very specific and detailed about their services and pricing |

B-2 - Experience and Qualifications - Reviewer Scores

| Reviewer | Score | Reason | Comments |
|---------------|-------|----------------------------------|---|
| Carmen Hayes | 40 | Meets or exceeds my expectations | Reference checks responses were great for clients they are currently doing business with, and they interviewed well with the committee. |
| Dianne Kimzey | 40 | Meets or exceeds my expectations | CBIZ has experience in all areas of the requested services. They have extensive experience in guiding companies through self funding. |



| | | | |
|---------------|----|------------------------------------|---|
| Gina Campbell | 40 | Meets or exceeds my expectations | My score is based on the broad range experience, qualifications, and the number of years (60) that CBIZ offers. |
| Cindy Wallace | 40 | Strongly fits desired attribute(s) | During our interviews, CBIZ was highly polished and answered every single question thoroughly and without hesitation to answer. I believe whole heartedly that CBIZ can come in and start their processes to assist the county. |

B-3 - References - Reviewer Scores

| Reviewer | Score | Reason | Comments |
|---------------|-------|----------------------------------|---|
| Carmen Hayes | 10 | High level of detail in response | Reference checks were favorable, and clients look forward to the continued partnership. |
| Dianne Kimzey | 10 | Meets or exceeds my expectations | Positive comments from all references. |
| Gina Campbell | 10 | Meets or exceeds my expectations | My score is based on their references' positive feedback.. |
| Cindy Wallace | 10 | Well-supported claim(s) | All references I was given to check were excellent. |

B-4 - Pricing - Reviewer Scores

| Reviewer | Score | Reason | Comments |
|---------------|-------|------------------------------------|--|
| Carmen Hayes | 30 | Meets or exceeds my expectations | Pricing was high but meets the expectations of what the County is seeking. |
| Dianne Kimzey | 20 | Other | CBIZ is the highest bid received.; however, they laid out their price proposal in a way with no questions or hidden costs regarding the cost of their services. There was too much price difference between the 2 bids to rate this much higher. |
| Gina Campbell | 35 | Strongly fits desired attribute(s) | My scoring reflects the presentation of their up front and transparent pricing in their response to the RFP. |



| | | | |
|---------------|----|----------------------------------|--|
| Cindy Wallace | 40 | High level of detail in response | Although the pricing is the higher of the 2 bidders, CBIZ provided a detailed breakdown of the pricing in each category that was complete. |
|---------------|----|----------------------------------|--|