

Scoring Summary Sheet

Final Evaluation Meeting

RFP No. and Name: GEN2126551P1 Third Party Administration of HSA, HRA, and FSA

Date: February 7, 2024

Location: Microsoft Teams and Room 430

Firm Name	Stephen Farmer	Philip McChesney	Mary Cuervo	Total	Ranking
Eagles, Benefits by Design, Inc.	59	54	63	175	4
HSA Bank	72	44	70	185	2
PayFlex Systems USA, Inc.	55	53	69	177	3
Total Administrative Services Corporation	67	62	68	197	1
WEX Health, Inc.	49	29	54	132	5
TIE BREAKER CRITERIA					
1. Vendor located within Broward County as set forth in Subsection 21.31.c.					
2. Vendor which provides domestic partner benefits.					
3. Vendor that has the lowest dollar volume of work, calculated by payments to vendor, by County over a five (5) year period from the date of the submittal.					
4. A re-vote or re-assessment of only the tied vendors.					
5. Preference to vendor receiving a majority of the total first-place votes.					

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Evaluation Criteria - Project Specific Criteria (Complete text of questions provided separately)	Maximum Points	Eagles, Benefits by Design, Inc.	HSA Bank	PayFlex Systems USA, Inc.	Total Administrative Services Corporation	WEX Health, Inc.
ABILITY OF PROFESSIONAL PERSONNEL (Total Maximum Points = 21)						
See Evaluation Criteria - question 1.a	2	2	1	2	2	1
See Evaluation Criteria - question 1.b	3	3	1	1	3	1
See Evaluation Criteria - question 1.c	3	2.5	2	2	3	1
See Evaluation Criteria - question 1.d	3	3	0	0	3	0
See Evaluation Criteria - question 1.e	10	10	6	10	10	10
QUALITY OF SERVICE AND CUSTOMER SERVICE (Total Maximum Points = 7)						
See Evaluation Criteria - question 2.a	3	2	2	1	3	1
See Evaluation Criteria - question 2.b	3	1.5	2.5	0	3	2
See Evaluation Criteria - question 2.c	1	0.5	1	0	1	0
HSA CASH ACCOUNT INTEREST (Total Maximum Points = 5)						
See Evaluation Criteria - question 3	5	2	5	2	3	3
IMPLEMENTATION (Total Maximum Points = 9)						
See Evaluation Criteria - question 4	9	5	6	9	8	7
ANALYSIS OF PERFORMANCE MEASURES QUESTIONNAIRE (Total Maximum Points = 4)						
See Evaluation Criteria - question 5	4	4	2	2	4	2
ANALYSIS OF PLAN DESIGN QUESTIONNAIRE (Total Maximum Points = 11)						
See Evaluation Criteria - question 6	11	8	10	9	10	8
ANALYSIS OF PORTAL DASHBOARD DESIGN QUESTIONNAIRE (Total Maximum Points = 9)						
See Evaluation Criteria - question 7	9	7	6	9	6	6
ANALYSIS OF PROJECT SPECIFIC VENDOR QUESTIONNAIRE (Total Maximum Points = 9)						
See Evaluation Criteria - question 8	9	8	7	8	8	7

Points Entered by Purchasing

Location - See Evaluation Criteria - question 9	5	0	0	0	0	0
Pricing Support See Evaluation Criteria - question 10	20	0	20	0	0	0
TOTAL SCORE (CALCULATED BY PURCHASING) Maximum 100 Points	100	58.5	71.5	55	67	49

Stephen Farmer

Name

February 7, 2024

Date

By submitting this document I certify that I have abided by the Cone of Silence Ordinance and have not been influenced or coerced by anyone in the assignment of the points by me for this procurement.

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See Evaluation Criteria - question 1.a	2	2	0	2	2	0
See Evaluation Criteria - question 1.b	3	3	0	1	3	0
See Evaluation Criteria - question 1.c	3	3	0	1	3	1
See Evaluation Criteria - question 1.d	3	3	0	0	3	0
See Evaluation Criteria - question 1.e	10	9	0	10	7	9
QUALITY OF SERVICE AND CUSTOMER SERVICE (Total Maximum Points = 7)						
See Evaluation Criteria - question 2.a	3	2	2	3	2	1
See Evaluation Criteria - question 2.b	3	1	2	1	3	1
See Evaluation Criteria - question 2.c	1	0.5	0.5	0.5	1	0
HSA CASH ACCOUNT INTEREST (Total Maximum Points = 5)						
See Evaluation Criteria - question 3	5	3	0	2	4	3
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See Evaluation Criteria - question 4	9	5	2	9	5	1
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See Evaluation Criteria - question 5	4	4	2	3	4	1
ANALYSIS OF PLAN DESIGN QUESTIONNAIRE (Total Maximum Points = 11)						
See Evaluation Criteria - question 6	11	8	6	6	10	6
ANALYSIS OF PORTAL DASHBOARD DESIGN QUESTIONNAIRE (Total Maximum Points = 9)						
See Evaluation Criteria - question 7	9	6	6	9	7	3
ANALYSIS OF PROJECT SPECIFIC VENDOR QUESTIONNAIRE (Total Maximum Points = 9)						
See Evaluation Criteria - question 8	9	4	3	5	8	3

Points Entered by Purchasing

Location - See Evaluation Criteria - question 9	5	0	0	0	0	0
Pricing Support See Evaluation Criteria - question 10	20	0	20	0	0	0
TOTAL SCORE (CALCULATED BY PURCHASING) Maximum 100 Points	100	53.5	43.5	52.5	62	29

Philip McChesney

Name

February 7, 2024

Date

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See Evaluation Criteria - question 2.b	3	1	2	3	3	2
See Evaluation Criteria - question 2.c	1	1	1	1	1	0
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ANALYSIS OF PROJECT SPECIFIC VENDOR QUESTIONNAIRE (Total Maximum Points = 9)						
See Evaluation Criteria - question 8	9	6	8	9	9	6

Points Entered by Purchasing

Location - See Evaluation Criteria - question 9	5	0	0	0	0	0
Pricing Support See Evaluation Criteria - question 10	20	0	20	0	0	0
TOTAL SCORE (CALCULATED BY PURCHASING) Maximum 100 Points	100	63	70	69	68	54

Mary Cuervo

Name

February 7, 2024

Date

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