## **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 Co	unty as set forth in Sub	osection 21.31.c.			
2. Vendor which provides domestic p	artner benefits.				
3. Vendor that has the lowest dollar v date of the submittal.	olume of work, calcula	ted by payments to ve	endor, by County over	a five (5) year per	iod from the
4. A re-vote or re-assessment of only	the tied vendors.				
5. Preference to vendor receiving a r	najority of the total first	-place votes.			

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Name		Date					
Stephen Farmer	February 7, 2024						
TAL SCORE (CALCULATED BY PURCHASING) iximum 100 Points	100	58.5	71.5	55	67	49	
Pricing Support See Evaluation Critiera - question 10	20	0	20	0	0	0	
Location - See Evaulation Criteria - question 9	5	0	0	0	0	0	
	Points E	ntered by Pu	rchasing				
(Total Maximum Points = 9) See Evaluation Criteria - question 8	9	8	7	8	8	7	
ANALYSIS OF PROJECT SPECIFIC VENDOR QUESTIONNAIRE (Total Maximum Painta = 0)							
See Evaluation Criteria - question 7	9	7	6	9	6	6	
ANALYSIS OF PORTAL DASHBOARD DESIGN QUESTIONNAIRE (Total Maximum Points = 9)							
See Evaluation Criteria - question 6	11	8	10	9	10	8	
ANALYSIS OF PLAN DESIGN QUESTIONNAIRE (Total Maximum Points = 11)							
See Evaluation Criteria - question 5	4	4	2	2	4	2	
ANALYSIS OF PERFORMANCE MEASURES QUESTIONNAIRE (Total Maximum Points = 4)							
See Evaluation Criteria - question 4	9	5	6	9	8	7	
IMPLEMENTATION (Total Maximum Points = 9)							
See Evaluation Criteria - question 3	5	2	5	2	3	3	
HSA CASH ACCOUNT INTEREST (Total Maximum Points = 5)							
See Evaluation Criteria - question 2.c	1	0.5	1	0	1	0	
See Evaluation Criteria - question 2.b	3	1.5	2.5	0	3	2	
See Evaluation Criteria - question 2.a	3	2	2	1	3	1	
(Total Maximum Points = 7)							
See Evaluation Criteria - question 1.e QUALITY OF SERVICE AND CUSTOMER SERVICE	10	10	6	10	10	10	
See Evaluation Criteria - question 1.d	3	3	0	0	3	0	
See Evaluation Criteria - question 1.c	3	2.5	2	2	3	1	
See Evaluation Criteria - question 1.b	3	3	1	1	3	1	
•	-	2	1				
(Total Maximum Points = 21) See Evaluation Criteria - guestion 1.a	2	2	4	2	2	1	
(Complete text of questions provided separately) ABILITY OF PROFESSIONAL PERSONNEL	Points	by Design, Inc.		Inc.	Services Corporation	Inc.	
Evaluation Criteria - Project Specific Criteria	Maximum	Eagles, Benefits	HSA Bank	PayFlex Systems USA,	Total Administrative	WEX Healt	

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.

## 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

ABILITY OF PROFESSIONAL PERSONNEL (Total Maximum Points = 21)         See Evaluation Criteria - question 1.a         See Evaluation Criteria - question 1.b         See Evaluation Criteria - question 1.c         See Evaluation Criteria - question 1.c         See Evaluation Criteria - question 1.d         See Evaluation Criteria - question 1.d         See Evaluation Criteria - question 1.e         QUALITY OF SERVICE AND CUSTOMER SERVICE (Total Maximum Points = 7)         See Evaluation Criteria - question 2.a         See Evaluation Criteria - question 2.a         See Evaluation Criteria - question 2.a         See Evaluation Criteria - question 2.b         See Evaluation Criteria - question 2.c         HSA CASH ACCOUNT INTEREST (Total Maximum Points = 5)	2 3 3 3 10 3 3 3 1 5	2 3 3 3 9 9 2 1 0.5 3	0 0 0 0 0 0 2 2 2 0.5	2 1 1 0 10 3 3 1 0.5	Corporation           2           3           3           3           7           2           3           1	0 0 1 0 9 9 1 1 1 0
See Evaluation Criteria - question 1.b         See Evaluation Criteria - question 1.c         See Evaluation Criteria - question 1.d         See Evaluation Criteria - question 1.d         QUALITY OF SERVICE AND CUSTOMER SERVICE (Total Maximum Points = 7)         See Evaluation Criteria - question 2.a         See Evaluation Criteria - question 2.a         See Evaluation Criteria - question 2.b         See Evaluation Criteria - question 2.c         HSA CASH ACCOUNT INTEREST	3 3 3 10 3 3 1	3 3 9 2 1 0.5	0 0 0 0 0 2 2 2	1 1 0 10 3 1	3 3 3 7 2 3	0 1 0 9 1 1 1
See Evaluation Criteria - question 1.c         See Evaluation Criteria - question 1.d         See Evaluation Criteria - question 1.e         QUALITY OF SERVICE AND CUSTOMER SERVICE (Total Maximum Points = 7)         See Evaluation Criteria - question 2.a         See Evaluation Criteria - question 2.a         See Evaluation Criteria - question 2.b         See Evaluation Criteria - question 2.c         HSA CASH ACCOUNT INTEREST	3 3 10 3 3 3 1	3 3 9 2 1 0.5	0 0 0 2 2	1 0 10 3 1	3 3 7 2 3	1 0 9 1 1
See Evaluation Criteria - question 1.d         See Evaluation Criteria - question 1.e         QUALITY OF SERVICE AND CUSTOMER SERVICE (Total Maximum Points = 7)         See Evaluation Criteria - question 2.a         See Evaluation Criteria - question 2.b         See Evaluation Criteria - question 2.c         HSA CASH ACCOUNT INTEREST	3 10 3 3 1	3 9 2 1 0.5	0 0 2 2	0 10 3 1	3 7 2 3	0 9 1 1
See Evaluation Criteria - question 1.e         QUALITY OF SERVICE AND CUSTOMER SERVICE (Total Maximum Points = 7)         See Evaluation Criteria - question 2.a         See Evaluation Criteria - question 2.b         See Evaluation Criteria - question 2.c         HSA CASH ACCOUNT INTEREST	10 3 3 1	9 2 1 0.5	0 2 2	10 3 1	7 2 3	9 1 1
QUALITY OF SERVICE AND CUSTOMER SERVICE (Total Maximum Points = 7)         See Evaluation Criteria - question 2.a         See Evaluation Criteria - question 2.b         See Evaluation Criteria - question 2.c         HSA CASH ACCOUNT INTEREST	3 3 1	2 1 0.5	2 2	3	2 3	1
(Total Maximum Points = 7) See Evaluation Criteria - question 2.a See Evaluation Criteria - question 2.b See Evaluation Criteria - question 2.c HSA CASH ACCOUNT INTEREST	3	1 0.5	2	1	3	1
See Evaluation Criteria - question 2.b See Evaluation Criteria - question 2.c HSA CASH ACCOUNT INTEREST	3	1 0.5	2	1	3	1
See Evaluation Criteria - question 2.c	1	0.5		_	-	
HSA CASH ACCOUNT INTEREST			0.5	0.5	1	0
	5	3				
	5	3				
See Evaluation Criteria - question 3		_	0	2	4	3
IMPLEMENTATION (Total Maximum Points = 9)						
See Evaluation Criteria - question 4	9	5	2	9	5	1
ANALYSIS OF PERFORMANCE MEASURES QUESTIONNAIRE (Total Maximum Points = 4)						
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 E	ntered by Pu	rchasing		1 1	
Location - See Evaulation Criteria - question 9	5	0	0	0	0	0
Pricing Support See Evaluation Critiera - question 10	20	0	20	0	0	0
DTAL SCORE (CALCULATED BY PURCHASING) aximum 100 Points	100	53.5	43.5	52.5	62	29
Philip McChesney			Ea	bruary 7, 20	124	
Name			re	Date	<i></i>	

## 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

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	0	2	2	1
See Evaluation Criteria - question 1.b	3	3	0	2	3	1
See Evaluation Criteria - question 1.c	3	2	1	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	7	10
QUALITY OF SERVICE AND CUSTOMER SERVICE (Total Maximum Points = 7)						
See Evaluation Criteria - question 2.a	3	2	3	3	3	2
See Evaluation Criteria - question 2.b	3	1	2	3	3	2
See Evaluation Criteria - question 2.c	1	1	1	1	1	0
HSA CASH ACCOUNT INTEREST (Total Maximum Points = 5)						
See Evaluation Criteria - question 3	5	5	5	5	5	5
IMPLEMENTATION (Total Maximum Points = 9)						
See Evaluation Criteria - question 4	9	7	6	9	9	5
ANALYSIS OF PERFORMANCE MEASURES QUESTIONNAIRE (Total Maximum Points = 4)						
See Evaluation Criteria - question 5	4	4	3	4	3	4
ANALYSIS OF PLAN DESIGN QUESTIONNAIRE (Total Maximum Points = 11)						
See Evaluation Criteria - question 6	11	8	8	10	9	10
ANALYSIS OF PORTAL DASHBOARD DESIGN QUESTIONNAIRE (Total Maximum Points = 9)						
See Evaluation Criteria - question 7	9	9	7	9	8	7
ANALYSIS OF PROJECT SPECIFIC VENDOR QUESTIONNAIRE (Total Maximum Points = 9)						
See Evaluation Criteria - question 8	9	6	8	9	9	6
	Points E	ntered by Pu	rchasing			
Location - See Evaulation Criteria - question 9	5	0	0	0	0	0
Pricing Support See Evaluation Critiera - question 10	20	0	20	0	0	0
OTAL SCORE (CALCULATED BY PURCHASING) aximum 100 Points	100	63	70	69	68	54
Mary Cuervo			Fe	bruary 7, 20	124	
Name		Date				
By submitting this document I certify that I have able ssignment of the points by me for this procurement		e of Silence Ordin	ance and have	not been influence	ed or coerced by a	inyone in the