

Evaluation Report

Procurement Number	RFx 3120002671/3150005356
RFP Name	RFP for Commercial Insurance Brokerage Services
RFP Release Date	July 27, 2023
Proposal Due Date and Time	August 29, 2023, 2:00 PM CST
Contract Effective Date	January 1, 2024
Evaluation Report Posting Date	December 7, 2023

The Mississippi Department of Finance and Administration's Office of Insurance (MDFA OI) conducted a Request for Proposal (RFP) solicitation to secure a vendor to provide commercial insurance brokerage services. The unabridged RFP as amended, including terms, conditions, scope of services and other matters anticipated to be incorporated into the resulting contract, may be accessed at <https://www.dfa.ms.gov/bids-and-rfps-notice>.

With the goal of awarding a four-year contract to include a one-year optional renewal, MDFA OI adhered to the applicable provisions of the *Public Procurement Review Board, Office of Personal Service Contract Review Rules and Regulations*, as well as agency guidelines, to evaluate the four proposals received to ensure they received a comprehensive, fair, and impartial evaluation. An internal evaluation committee utilized consensus scoring to evaluate the proposal using a three-step process consisting of Compliance, Analysis, and Finalist phases. A detailed description of the evaluation process is provided in Section 9.12 of the RFP document. Evaluation factors and their respective weighing included Cost at 36%, Technical at 34%, Management at 25%, and Finalist Presentations at 5%.

As a result of the evaluation process described herein, the proposals are ranked by vendor in order of final score, highest to lowest, as follows:

1. Aon Risk Services South, Inc.
2. Arthur J. Gallagher & Company

Alliant Insurance Services, Inc. and Lockton Companies were determined non-responsive and/or non-responsible and notified separately of the reason(s) therefore.

Attached is the Summary Evaluation Score Sheet. The evaluation committee was comprised of the following individuals based on their knowledge and expertise related to the services being solicited: Bert Emrick, State Insurance Administrator; George Roberson, Director of Risk/State Floodplain Manager; Glenn R. Kornbrek, MDFA Deputy Executive Director; Cindy Bradshaw, DOM-Executive Deputy Director of Eligibility; David Buford, MIHL Director of Risk Management; and Alicia Coleman, MDFA OI Procurement and Contracts Director.

Based on the evaluation results, the MDFA OI will enter into contract negotiations with Aon Risk Services South, Inc. to provide commercial insurance brokerage services. Subject to successful negotiations and final approval by the Public Procurement Review Board, a four-year plus one optional one-year renewal contract is expected to be executed with Aon Risk Services South, Inc., with services to commence effective January 1, 2024, at a contract value estimated not to exceed approximately \$4.00 for the initial four-year term.

2023 Commercial Insurance Brokerage Services Request for Proposal (RFP) - Scoring Grids - Summary Total Sheet

BEFORE BEST AND FINAL

				Alliant Insurance Services, Inc.	Lockton Companies	Arthur J. Gallagher & Company	Aon Risk Services South, Inc.
Compliance Categories:			Pass/Fail				
1		Deemed Responsive/Responsible Per Compliance Evaluation	✓ <input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	✓	✓
Analysis Categories:			Weights				
1	36	Cost	36%			0.00	36.00
2	34	Technical	34%			30.92	33.10
3	25	Management	25%			23.75	22.05
	95						
Analysis Sub-total			95%			54.67	91.15
Finalists Categories:							
<i>Finalist Phase may include any or all of the following:</i>							
		Record of Past Performance of Similar Work (Experience and Qualifications): Scored on a Pass/Fail basis.	✓ <input type="checkbox"/>				✓
5		Finalist Presentation: +5 points	5%				
		Best and Final Offer - Factored into the Price category					
Final Total						54.67	91.15