

| Insurance Broker Services (RFP-060-23-WV)<br>Evaluation Form | <i>Alliant<br/>Insurance<br/>Services, Inc.</i> | <i>Aon</i> | <i>Arthur J.<br/>Gallagher Risk<br/>Management<br/>Services, LLC</i> | <i>MCGRIFF</i> | <i>Risk Management<br/>Associates, Inc.</i> | <i>RSC Insurance<br/>Brokerage, Inc.</i> |
|--|---|------------|--|----------------|---|--|
| RANK (Ordinal Number)  |   |            |  |                |   |  |
| Azita Behmardi   | 89  | 93         | 90   | 90             | 95  | 95                                       |
| Raelin Storey  | 84  | 94         | 84   | 86             | 93  | 88                                       |
| Stacy Myers  | 71  | 100        | 69   | 76             | 95  | 91                                       |
| Tammie L. Hechler  | 83  | 100        | 51   | 51             | 96  | 88                                       |
| Tanya Bouloy   | 86  | 98         | 86   | 91             | 94  | 95                                       |
| <b>Gross Score</b>   | <b>413</b>                                      | <b>485</b> | <b>380</b>   | <b>394</b>     | <b>473</b>                                  | <b>457</b>                               |
| <b>Firm Average Score</b>                                    | <b>83</b>                                       | <b>97</b>  | <b>76</b>  | <b>79</b>      | <b>95</b>                                   | <b>91</b>                                |
| <b>Firm Final Ranking</b>                                    | <b>4</b>  | <b>1</b>   | <b>6</b>   | <b>5</b>       | <b>2</b>                                    | <b>3</b>                                 |

| <b>Insurance Broker Services (RFP-060-23-WV)</b><br><b>Evaluation Form</b>   | <i>Alliant Insurance Services, Inc.</i> | <i>Aon</i> | <i>Arthur J. Gallagher Risk Management Services, LLC</i> | <i>MCGRIFF</i> | <i>Risk Management Associates, Inc.</i> | <i>RSC Insurance Brokerage, Inc.</i> |
|--|---|------------|--|----------------|---|--------------------------------------|
| <b>Selection Committee Member: Azita Behmardi</b>  |   |            |  |                |   |                                      |
| <b>EVALUATION CRITERIA</b>   |   |            |  |                |   |                                      |
| <b>Profile of Proposer (Max 10 Points)</b><br>a. State whether your organization is national, regional or local.<br><br>b. State the location of the office from which your work is to be performed.<br><br>c. Describe the firm, including the size, range of activities, etc. Particular emphasis should be given as to how the firm-wide experience and expertise in the area addressed by this Request for Proposal, will be brought to bear on the proposed work.<br><br>d. Provide a list and description of similar municipal engagements satisfactorily performed within the past three (3) years. For each engagement listed, include the name, email, fax and telephone number of a representative for whom the engagement was undertaken who can verify satisfactory performance.<br><br>e. Have you been involved in litigation within the last five (5) years or is there any pending litigation arising out of your performance? | 9                                       | 9          | 5  | 10             | 10                                      | 9                                    |
| <b>Proposers' Qualifications (Max 25 Points)</b><br>a. Identify the project manager and each individual who will work as part of the engagement. Include resumes for each person to be assigned. The resumes may be included as an appendix.<br><br>b. Describe the experience in conducting similar projects for each of the consultants assigned to the engagement. Describe the relevant educational background of each individual.<br><br>c. Describe the organization of the proposed project team, detailing the level of involvement, field of expertise and estimated hours for each member of the team.<br><br>d. Describe what municipal staff support you anticipate for the project.   | 25                                      | 25         | 25   | 25             | 25                                      | 24                                   |
| <b>Project Understanding, Proposed Approach and Methodology (Max 20 Points)</b><br>Describe your approach to performing the contracted work. This should include the following points:<br><br>a. Type of services provided. Discuss your role and that of other parties involved in the data gathering, data analysis and recommendation process.<br><br>b. Discuss your project plan for this engagement outlining major tasks and responsibilities, time frames and staff assigned.  | 20                                      | 20         | 19   | 20             | 20                                      | 20                                   |
| <b>Services Offered (Max 25 Points)</b><br>Provide a detailed listing of the types of services your firm offers.   | 25                                      | 25         | 25   | 25             | 25                                      | 25                                   |
| <b>Proposers' Fee Schedule (Max 20 Points)</b><br>The Proposer should submit their fee schedule here. Express your fee in a lump sum not-to-exceed maximum amount and a separate price for the components of the work shown in scope of service and include a chart of the rates. The lump sum includes all costs to perform the work, travel, per diem expenses, photocopying, telephone lines or other incidental expenses, if applicable. If additional work is required beyond the scope of this contract, the City reserves the right negotiate those services or to obtain from other service providers. This may include additional presentations or follow-up as requested.  | 10                                      | 14         | 16   | 10             | 15                                      | 17                                   |
| <b>Gross Score</b>   | 89                                      | 93         | 90   | 90             | 95                                      | 95                                   |

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|---|---|------------|--|----------------|---|--------------------------------------|
| <b>Selection Committee Member: Raelin Storey</b>  |   |            |  |                |   |                                      |
| <b>EVALUATION CRITERIA</b>  |   |            |  |                |   |                                      |
| <b>Profile of Proposer (Max 10 Points)</b><br>a.State whether your organization is national, regional or local.<br><br>b.State the location of the office from which your work is to be performed.<br><br>c.Describe the firm, including the size, range of activities, etc. Particular emphasis should be given as to how the firm-wide experience and expertise in the area addressed by this Request for Proposal, will be brought to bear on the proposed work.<br><br>d.Provide a list and description of similar municipal engagements satisfactorily performed within the past three (3) years. For each engagement listed, include the name, email, fax and telephone number of a representative for whom the engagement was undertaken who can verify satisfactory performance.<br><br>e.Have you been involved in litigation within the last five (5) years or is there any pending litigation arising out of your performance? | 8                                       | 9          | 8  | 9              | 9                                       | 9                                    |
| <b>Proposers' Qualifications (Max 25 Points)</b><br>a.Identify the project manager and each individual who will work as part of the engagement. Include resumes for each person to be assigned. The resumes may be included as an appendix.<br><br>b.Describe the experience in conducting similar projects for each of the consultants assigned to the engagement. Describe the relevant educational background of each individual.<br><br>c.Describe the organization of the proposed project team, detailing the level of involvement, field of expertise and estimated hours for each member of the team.<br><br>d.Describe what municipal staff support you anticipate for the project.  | 20                                      | 23         | 20   | 20             | 23                                      | 21                                   |
| <b>Project Understanding, Proposed Approach and Methodology (Max 20 Points)</b><br>Describe your approach to performing the contracted work. This should include the following points:<br><br>a.Type of services provided. Discuss your role and that of other parties involved in the data gathering, data analysis and recommendation process.<br><br>b.Discuss your project plan for this engagement outlining major tasks and responsibilities, time frames and staff assigned.   | 18                                      | 20         | 18   | 18             | 19                                      | 18                                   |
| <b>Services Offered (Max 25 Points)</b><br>Provide a detailed listing of the types of services your firm offers.  | 24                                      | 23         | 22   | 21             | 23                                      | 22                                   |
| <b>Proposers' Fee Schedule (Max 20 Points)</b><br>The Proposer should submit their fee schedule here. Express your fee in a lump sum not-to-exceed maximum amount and a separate price for the components of the work shown in scope of service and include a chart of the rates. The lump sum includes all costs to perform the work, travel, per diem expenses, photocopying, telephone lines or other incidental expenses, if applicable. If additional work is required beyond the scope of this contract, the City reserves the right negotiate those services or to obtain from other service providers. This may include additional presentations or follow-up as requested.   | 14                                      | 19         | 16   | 18             | 19                                      | 18                                   |
| <b>Gross Score</b>  | 84                                      | 94         | 84   | 86             | 93                                      | 88                                   |

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|---|---|------------|--|----------------|---|--------------------------------------|
| <b>Selection Committee Member: Stacy Myers</b>  |   |            |  |                |   |                                      |
| <b>EVALUATION CRITERIA</b>  |   |            |  |                |   |                                      |
| <b>Profile of Proposer (Max 10 Points)</b><br>a.State whether your organization is national, regional or local.<br><br>b.State the location of the office from which your work is to be performed.<br><br>c.Describe the firm, including the size, range of activities, etc. Particular emphasis should be given as to how the firm-wide experience and expertise in the area addressed by this Request for Proposal, will be brought to bear on the proposed work.<br><br>d.Provide a list and description of similar municipal engagements satisfactorily performed within the past three (3) years. For each engagement listed, include the name, email, fax and telephone number of a representative for whom the engagement was undertaken who can verify satisfactory performance.<br><br>e.Have you been involved in litigation within the last five (5) years or is there any pending litigation arising out of your performance? | 8                                       | 10         | 6  | 10             | 10                                      | 8                                    |
| <b>Proposers' Qualifications (Max 25 Points)</b><br>a.Identify the project manager and each individual who will work as part of the engagement. Include resumes for each person to be assigned. The resumes may be included as an appendix.<br><br>b.Describe the experience in conducting similar projects for each of the consultants assigned to the engagement. Describe the relevant educational background of each individual.<br><br>c.Describe the organization of the proposed project team, detailing the level of involvement, field of expertise and estimated hours for each member of the team.<br><br>d.Describe what municipal staff support you anticipate for the project.  | 25                                      | 25         | 20   | 25             | 25                                      | 25                                   |
| <b>Project Understanding, Proposed Approach and Methodology (Max 20 Points)</b><br>Describe your approach to performing the contracted work. This should include the following points:<br><br>a.Type of services provided. Discuss your role and that of other parties involved in the data gathering, data analysis and recommendation process.<br><br>b.Discuss your project plan for this engagement outlining major tasks and responsibilities, time frames and staff assigned.   | 15                                      | 20         | 18   | 18             | 20                                      | 20                                   |
| <b>Services Offered (Max 25 Points)</b><br>Provide a detailed listing of the types of services your firm offers.  | 18                                      | 25         | 15   | 22             | 25                                      | 20                                   |
| <b>Proposers' Fee Schedule (Max 20 Points)</b><br>The Proposer should submit their fee schedule here. Express your fee in a lump sum not-to-exceed maximum amount and a separate price for the components of the work shown in scope of service and include a chart of the rates. The lump sum includes all costs to perform the work, travel, per diem expenses, photocopying, telephone lines or other incidental expenses, if applicable. If additional work is required beyond the scope of this contract, the City reserves the right negotiate those services or to obtain from other service providers. This may include additional presentations or follow-up as requested.   | 5                                       | 20         | 10   | 1              | 15                                      | 18                                   |
| <b>Gross Score</b>  | 71                                      | 100        | 69   | 76             | 95                                      | 91                                   |

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|--|---|------------|--|----------------|---|--|
| <b>Selection Committee Member: Tammie L. Hechler</b>   |   |            |  |                |   |  |
| <b>EVALUATION CRITERIA</b>   |   |            |  |                |   |  |
| <b>Profile of Proposer (Max 10 Points)</b><br>a. State whether your organization is national, regional or local.<br><br>b. State the location of the office from which your work is to be performed.<br><br>c. Describe the firm, including the size, range of activities, etc. Particular emphasis should be given as to how the firm-wide experience and expertise in the area addressed by this Request for Proposal, will be brought to bear on the proposed work.<br><br>d. Provide a list and description of similar municipal engagements satisfactorily performed within the past three (3) years. For each engagement listed, include the name, email, fax and telephone number of a representative for whom the engagement was undertaken who can verify satisfactory performance.<br><br>e. Have you been involved in litigation within the last five (5) years or is there any pending litigation arising out of your performance? | 10  | 10         | 8  | 7              | 10  | 8  |
| <b>Proposers' Qualifications (Max 25 Points)</b><br>a. Identify the project manager and each individual who will work as part of the engagement. Include resumes for each person to be assigned. The resumes may be included as an appendix.<br><br>b. Describe the experience in conducting similar projects for each of the consultants assigned to the engagement. Describe the relevant educational background of each individual.<br><br>c. Describe the organization of the proposed project team, detailing the level of involvement, field of expertise and estimated hours for each member of the team.<br><br>d. Describe what municipal staff support you anticipate for the project.   | 25  | 25         | 2  | 12             | 25  | 17                                       |
| <b>Project Understanding, Proposed Approach and Methodology (Max 20 Points)</b><br>Describe your approach to performing the contracted work. This should include the following points:<br><br>a. Type of services provided. Discuss your role and that of other parties involved in the data gathering, data analysis and recommendation process.<br><br>b. Discuss your project plan for this engagement outlining major tasks and responsibilities, time frames and staff assigned.  | 18  | 20         | 10   | 10             | 18  | 18                                       |
| <b>Services Offered (Max 25 Points)</b><br>Provide a detailed listing of the types of services your firm offers.   | 25  | 25         | 17   | 17             | 23  | 25                                       |
| <b>Proposers' Fee Schedule (Max 20 Points)</b><br>The Proposer should submit their fee schedule here. Express your fee in a lump sum not-to-exceed maximum amount and a separate price for the components of the work shown in scope of service and include a chart of the rates. The lump sum includes all costs to perform the work, travel, per diem expenses, photocopying, telephone lines or other incidental expenses, if applicable. If additional work is required beyond the scope of this contract, the City reserves the right negotiate those services or to obtain from other service providers. This may include additional presentations or follow-up as requested.  | 5   | 20         | 14   | 5              | 20  | 20                                       |
| <b>Gross Score</b>   | 83  | 100        | 51   | 51             | 96  | 88                                       |

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|--|---|------------|--|----------------|---|--------------------------------------|
| <b>Selection Committee Member: Tanya Bouloy</b>  |   |            |  |                |   |                                      |
| <b>EVALUATION CRITERIA</b>   |   |            |  |                |   |                                      |
| <b>Profile of Proposer (Max 10 Points)</b><br>a. State whether your organization is national, regional or local.<br><br>b. State the location of the office from which your work is to be performed.<br><br>c. Describe the firm, including the size, range of activities, etc. Particular emphasis should be given as to how the firm-wide experience and expertise in the area addressed by this Request for Proposal, will be brought to bear on the proposed work.<br><br>d. Provide a list and description of similar municipal engagements satisfactorily performed within the past three (3) years. For each engagement listed, include the name, email, fax and telephone number of a representative for whom the engagement was undertaken who can verify satisfactory performance.<br><br>e. Have you been involved in litigation within the last five (5) years or is there any pending litigation arising out of your performance? | 9                                       | 10         | 8  | 9              | 10                                      | 9                                    |
| <b>Proposers' Qualifications (Max 25 Points)</b><br>a. Identify the project manager and each individual who will work as part of the engagement. Include resumes for each person to be assigned. The resumes may be included as an appendix.<br><br>b. Describe the experience in conducting similar projects for each of the consultants assigned to the engagement. Describe the relevant educational background of each individual.<br><br>c. Describe the organization of the proposed project team, detailing the level of involvement, field of expertise and estimated hours for each member of the team.<br><br>d. Describe what municipal staff support you anticipate for the project.   | 20                                      | 25         | 20   | 20             | 23                                      | 23                                   |
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| <b>Services Offered (Max 25 Points)</b><br>Provide a detailed listing of the types of services your firm offers.   | 23                                      | 25         | 20   | 22             | 24                                      | 24                                   |
| <b>Proposers' Fee Schedule (Max 20 Points)</b><br>The Proposer should submit their fee schedule here. Express your fee in a lump sum not-to-exceed maximum amount and a separate price for the components of the work shown in scope of service and include a chart of the rates. The lump sum includes all costs to perform the work, travel, per diem expenses, photocopying, telephone lines or other incidental expenses, if applicable. If additional work is required beyond the scope of this contract, the City reserves the right negotiate those services or to obtain from other service providers. This may include additional presentations or follow-up as requested.  | 14                                      | 18         | 18   | 20             | 17                                      | 19                                   |
| <b>Gross Score</b>   | 86                                      | 98         | 86   | 91             | 94                                      | 95                                   |