

Services Description: Health Insurance Broker Services

Consultant Name: _____

Evaluation Criteria to be Rated by Scorers					
Category	Scoring Criteria	Scale	Score	Weight	Weighted Score
Public Entity Experience	Indiana Market Knowledge & Self-Funded Expertise			20	0
	Demonstrated high level of knowledge and expertise for required services that will result in added benefit.	2			
	Expertise and knowledge at appropriate level.	1			
	Insufficient expertise and/or knowledge exhibited.	0			
Account Team Experience	Team Qualifications, Dedicated Service Model & Local Support			15	0
	Demonstrated high level of expertise and resources identified for required services for value added benefit.	2			
	Expertise and resources at appropriate level.	1			
	Insufficient expertise and/or resources.	0			
Analytics, Benchmarking & Reporting	Data Analytics, Claims Analysis, Benchmarking & Reporting Capabilities			15	0
	Data Analytics, Claims Analysis, Benchmarking & Reporting experience included in the proposal that could result in added value	2			
	Data Analytics, Claims Analysis, Benchmarking & Reporting experience included in the proposal at the appropriate level	1			
	Data Analytics, Claims Analysis, Benchmarking & Reporting experience included in the proposal does not meet expectations	0			
Planning, Cost Containment & Client Outcomes	Strategic Planning, Cost Containment & Demonstrated Client Outcomes			10	0
	Exhibited ability to deliver more than adequate that could result in added value.	2			
	Exhibited the ability to deliver strategic planning, cost containment and client outcomes.	1			
	Ability to deliver was not clear or appears insufficient.	0			
Employee Communications	Employee Communications, Enrollment Coordination & Ongoing Employee Support			10	0
	Communication, Coordination and Employee support results included in the proposal that could result in added value	2			
	Communication, Coordination and Employee support included in the proposal at the appropriate level	1			
	Basic Communication, Coordination and Employee support referenced in the proposal	0			
Compliance, Support, Resources	Compliance, Regulatory Support & Educational Resources			10	0
	Compliance, Regulatory Support & Educational Resources experience included in the proposal that could result in added value	2			
	Compliance, Regulatory Support & Educational Resources experience included in the proposal at the appropriate level	1			
	Compliance, Regulatory Support & Educational Resources experience included in the proposal does not meet expectations	0			
Compensation	Compensation Transparency, Performance Accountability & Fee Structure			5	0
	Fee structure exceeds expectations and could result in added value	2			
	Fee structure meets expectations	1			
	Fee structure is a concern and does not meet expectations	0			
References	Client References & Satisfaction			5	0
	Demonstrated high level of experience in similar type and complexity.	2			
	Experience in similar type and complexity shown in resume.	1			
	Experience in different type or lower complexity.	0			
Weighted Sub-Total:					0

I have thoroughly reviewed the letter of interest for this consultant and certify that the above scores represent my best judgment of this firm's abilities.

Signature: _____

Print Name: _____

Title: _____

Date: _____