City of Jacksonville, Florida

Lenny Curry, Mayor

Employee Services Department
City Hall, 117 West Duval St., Suite 150
Jacksonville, Florida 32202

ONE CITY. ONE JACKSONVILLE.

MEMORANDUM

TO: Greg Pease, Chairperson
Professional Services Evaluation Committee

FROM: Robert E. Parr, Chief, Compensation and Benefits Division
Randall Barnes, Senior Debt Manager

RE: Deferred Compensation Provider P43-17

DATE: August 2, 2016

The subcommittee received nine (9) proposals for the deferred compensation provider, seven (7) were found to be responsive, interested, qualified, and available to provide services required by the Request for Proposal and two (2) were deemed non-responsive. The proposals were evaluated using the criteria outlined in the Purchasing Code as augmented by the RFP and the proposals.

Based on the above, the following firms listed alphabetically and ranked, were determined to be the most qualified:

(1) Empower
(3) Mass Mutual
(2) Nationwide

The subcommittee requests to meet with the Professional Services Evaluation Committee at your earliest convenience for the purpose of submitting our recommendation to the Mayor for final selection. Upon his signature, we request permission to conduct finalist presentations for the top two firms.

Attachments:

Evaluation Matrix

EVALUATION MATRIX

EVALUATION SCALE

PROJECT NO: **P-43-17**

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AVERAGE

QUALIFIED **EXTREMELY QUALIFIED**

PROJECT TITLE: Retirement Plan Service Provider

Consultant	Competence -	Current Workload -	Financial Responsibility	Ability to Observe and Advise Whether Plans and Specifications -	Past and Present Record of Professional Accomplishments with City Agencies and Others	Proximity to the Project -	Past & Present Demonstrated Commitment to Small & Minority Businesses & Contributions Toward A Diverse Market Place	Ability to Design an Approach and Work Plan to Meet the Project Requirements	Quotation of rates, fees, charges & other detailed cost proposals or cost breakdewn information	Volume of current and prior work performed -	Overall
Total Points Assessed	**15.00**	**10.00**	**15.00**	**5.00**	**10.00**	**5.00**	**10.00**	**10.00**	**15.00**	**5.00**	**100.00**
Empower	12.50	10.00	15.00	4.00	10.00	4.00	9.00	9.50	12.00	1.00	**87.00**
ICMA	11.00	8.00	12.00	3.00	7.50	2.50	8.50	6.50	13.00	5.00	**77.00**
Lincoln	10.50	9.00	13.50	4.50	3.50	3.00	1.50	7.50	12.00	5.00	**70.00**
Mass Mutual	12.50	9.50	14.50	4.50	9.50	3.50	4.50	8.50	7.00	5.00	**79.00**
Nationwide	12.50	9.50	14.00	4.50	8.00	3.50	4.00	8.50	14.00	5.00	**83.50**
VALIC	11.50	9.00	13.00	4.00	8.00	3.00	7.00	6.00	4.50	5.00	**71.00**
VOYA	12.50	9.00	12.50	4.00	8.00	4.50	6.50	8.00	4.00	5.00	**74.00**