

# Public Agenda Item # 15

*Consideration of Contract Award Recommendation for Benefits Consultant Services for the Texas Employees Group Benefits Program - (Action)*

December 7, 2021

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# Benefits Consultant Services

## *Request for Qualifications (RFQ)*



ERS does not have a current contract in place for benefits consultant services.

The Benefits Consultant Services Request for Qualifications (RFQ) sought a qualified entity to provide benefits consultant services and assist with potential projects in connection with health and welfare benefits and programs available within the Texas Employees Group Benefits Program (GBP).

# Benefits Consultant Services

## *Request for Qualifications (RFQ)*



- On June 1, 2021, ERS issued the RFQ.
- On July 19, 2021, ERS received 5 responses:
  - Aon Consulting, Inc.;
  - Gallagher Benefit Services, Inc.;
  - Milliman, Inc.;
  - The Segal Company (Southeast), Inc.; and
  - Willis Towers Watson US LLC.

# Benefits Consultant Services

## *Preliminary Review Phase*



For the Preliminary Review Phase, ERS evaluated:

- Minimum Requirements;
- Compliance with the RFQ;
- Responsiveness; and
- Certain vendor performance checks required by the Texas Comptroller of Public Accounts.

# Benefits Consultant Services

## *Qualifications Review Phase*



ERS passed all five entities through to the Qualifications Review Phase:

- Aon Consulting, Inc.;
- Gallagher Benefit Services, Inc.;
- Milliman, Inc.;
- The Segal Company (Southeast), Inc.; and
- Willis Towers Watson US LLC.

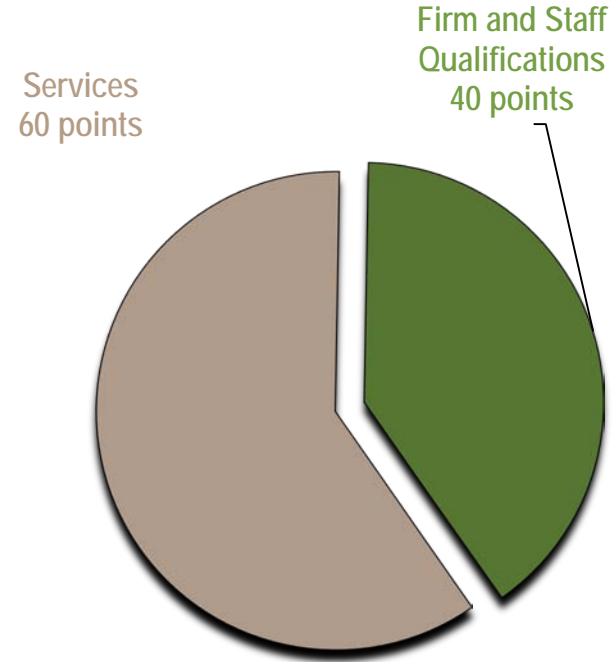
# Benefits Consultant Services

## Qualifications Review Phase



Two main categories scored:

- Firm and Staff Qualifications: 40 points
- Services: 60 points



# Benefits Consultant Services

## *Qualifications Review Phase*



ERS evaluated these pass/fail items during the Qualifications Review Phase:

- Legal Requirements and Regulatory Compliance; and
- Financial Stability.

# Benefits Consultant Services



## *Qualifications Review Phase*

Based on the scores for pass/fail items, Firm and Staff Qualifications and Services during the Qualifications Review Phase, ERS selected the following entities as finalists:

- Milliman, Inc. and
- Willis Towers Watson US LLC.



# Benefits Consultant Services

## *Finalists Review Phase*

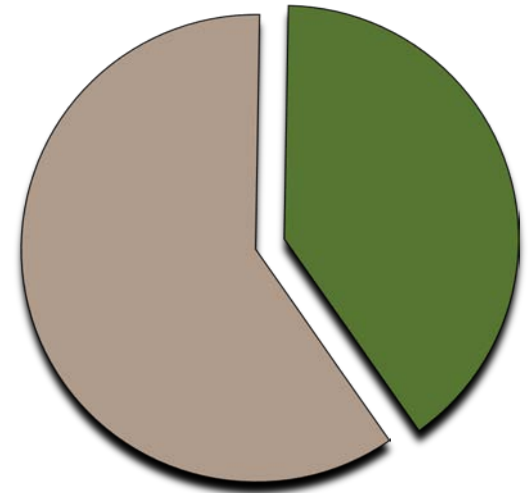


ERS evaluated Finalists based on new and clarified information:

- Interviews (Remote)
- Past Performance
- Contractibility and Legal Requirements and Regulatory Compliance

Services  
60 points

Firm and Staff  
Qualifications  
40 points



# Benefits Consultant Services



## *Finalists Review Phase*

- The RFQ evaluation team and OPCO representatives met with Executive Office and reviewed the RFQ evaluation team findings.
- A determination was made as to the most-qualified benefits consultant firm offering a fair and reasonable price.

# Benefits Consultant Services



## *ERS Recommendation*

Based on the evaluation process discussed, ERS recommends the Board of Trustees of the Employees Retirement System of Texas award the contract to [\_\_\_\_\_] to provide Benefits Consultant Services.

Questions?  
**Action Item**