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INDEPENDENT SCHOOL DISTRICT  
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**To:** Bill Powell  
Assistant Superintendent of Support Services

**From:** Jennifer Chiu  
Director of Purchasing

**Date:** June 1, 2020

**Re:** Athletic/All Activities Student Accident Insurance  
Annual Contract #20-08-1520RFP

The following bids were received and opened at 3:00 p.m., Thursday, March 26, 2020 as advertised and specified in documents concerning **Annual Contract #20-08-1520RFP Athletic/All Activities Student Accident Insurance**. The bids received are located on pages 2-6.

**Recommendation:** The Brokerage Store

**Funding:** Athletic Revenues and Parents

**Estimated Expenditure:** \$400,980.00

**Contract Term:** August 1, 2020 - July 31, 2023

**Renewal:** 2 Years

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**20-08-1520RFP Athletic/All Activities Student Accident Insurance**

<b>Company/Vendor Name</b>
Achieve Financial Group
AMA & Associates, LLC
Health Special Risk, Inc./Mendez Insurance Services, PLLC
Student Insurance Plans
The Brokerage Store

**Instructions and directions for completing RFP Evaluation Matrix**

Each Respondent is to be scored by the following scale:

- 5.0 to 4.5 = Exceptional, exceeds and fully meets all requirements
- 4.4 to 3.5 = Advantageous, exceeds some requirements
- 3.4 to 2.5 = Meets minimal requirements
- 2.4 to 1.5 = Addresses most of the minimal requirements
- 1.4 to 1.0 = Addresses part of minimal requirements

Enter your point (shown above) for each criterion being evaluated.

20-08-1520RFP Athletic/All Activities Student Accident Insurance

TEAM SCORE SUMMARY

Company/Vendor Name	Evaluator 1	Evaluator 2	Evaluator 3	Average Score	Ranking
Achieve Financial Group	69.00	87.80	80.00	78.93	2
AMA & Associates, LLC	32.80	46.50	59.00	46.10	5
Health Special Risk, Inc./Mendez Insurance Services, PLLC	75.00	81.20	64.00	73.40	4
Student Insurance Plans	64.00	84.30	79.00	75.77	3
<b>The Brokerage Store</b>	<b>80.00</b>	<b>87.70</b>	<b>80.00</b>	<b>82.57</b>	<b>1</b>

**RESPONDENT SUMMARY**

**20-08-1520RFP Athletic/All Activities Student Accident Insurance**

Evaluator 1:

<b>Company/Vendor Name:</b>	Overall cost proposed	Capability of the proposer to support the services quoted	References	Compliance with the RFP basic requirements and forms	Experience with political subdivisions	<b>Total</b>
Achieve Financial Group	32.00	10.00	15.00	6.00	6.00	69.00
AMA & Associates, LLC	12.00	10.00	0.00	4.80	6.00	32.80
Health Special Risk, Inc./Mendez Insurance Services, PLLC	40.00	10.00	15.00	4.00	6.00	75.00
Student Insurance Plans	24.00	15.00	15.00	6.00	4.00	64.00
The Brokerage Store	24.00	25.00	15.00	6.00	10.00	80.00

**RESPONDENT SUMMARY**

**20-08-1520RFP Athletic/All Activities Student Accident Insurance**

Evaluator 2:

<b>Company/Vendor Name:</b>	<b>Overall cost proposed</b>	<b>Capability of the proposer to support the services quoted</b>	<b>References</b>	<b>Compliance with the RFP basic requirements and forms</b>	<b>Experience with political subdivisions</b>	<b>Total</b>
Achieve Financial Group	36.80	22.50	13.50	8.00	7.00	87.80
AMA & Associates, LLC	20.00	17.50	0.00	2.00	7.00	46.50
Health Special Risk, Inc./Mendez Insurance Services, PLLC	35.20	17.50	13.50	8.00	7.00	81.20
Student Insurance Plans	33.60	22.50	13.20	8.00	7.00	84.30
The Brokerage Store	35.20	22.50	15.00	8.00	7.00	87.70

**RESPONDENT SUMMARY**

**20-08-1520RFP Athletic/All Activities Student Accident Insurance**

Evaluator 3:

<b>Company/Vendor Name:</b>	<b>Overall cost proposed</b>	<b>Capability of the proposer to support the services quoted</b>	<b>References</b>	<b>Compliance with the RFP basic requirements and forms</b>	<b>Experience with political subdivisions</b>	<b>Total</b>
Achieve Financial Group	32.00	20.00	12.00	8.00	8.00	80.00
AMA & Associates, LLC	32.00	15.00	0.00	6.00	6.00	59.00
Health Special Risk, Inc./Mendez Insurance Services, PLLC	40.00	15.00	9.00	0.00	0.00	64.00
Student Insurance Plans	40.00	15.00	12.00	6.00	6.00	79.00
The Brokerage Store	24.00	25.00	15.00	8.00	8.00	80.00