

**RFP 22-500620, Insurance Broker Services - Evaluation Summary**

**Criteria**

	<b>Alliant Insurance Services</b>	<b>McGriff Insurance Services</b>	<b>Marsh &amp; McLennan</b>
<p><b>Technical Approach</b></p> <p>a.) Responders are required to describe the procedures and methods that will achieve the required outcome of the project as specified herein:                      b) Include a listing of the County’s responsibilities and the Responder’s responsibilities required to complete the project; and                      c) Provide a project schedule at the task level starting with the receipt of the Notice to Proceed and ending with project completion.                      d) Complete product information, including descriptive literature, shall be included with the response in order to substantiate that the service meets the specified minimum requirements.</p>	<p>a) well written work plan was submitted. Only use AM Best of A- or better rated companies. Robust training program. Large data access support provided. Mobile app could help support OCIP contractors and subcontractors working remotely.                      b) completed                      c) completed, typically requires 180 days for transitional period                      d) scope of services were provided and very informational included program development, carrier relationships, risk management, claims management, and loss control.                      #10 on the Large Broker List, Flexibility, Coverage up to 5 million, detailed OCIP, a lot of bells and whistles, OCIP manuals. Robust training platform. Very good explanation of their RIMS, WrapX and dynamic portal.</p>	<p>a) included in project schedule. Lead team member has less than 2 years of experience with the company. Company not in top 100 of Brokers List                      b) outlined in project schedule                      c) completed, typically requires 120 to 150 days for transitional period. Seems more timely than current incumbent.                      d) scope of services were provided and very informational included program development, carrier relationships, risk management, claims management, and loss control. Provided a lot of information on OCIP management. No OCIP reference included.</p>	<p>a) Procedure and methods were thoroughly explained. Maximize the return on your risk management, investment through increased efficiency, improved business - risk decisions and lower cost. 5 step conceptual plan to create risk management was very descriptive and not basic information. Technical approach discussed marketing approach, benefit to DeKalb (company does over \$67 billion/year in premiums, largest insurance broker in US, claims management, loss control expertise, consulting in multiple areas, and management of the OCIP program. b) adequately explained roles and responsibilities of each party.                      c) Schedule provided only showed level of involvement from pre-construction through post-construction. Additional schedule provided later in the proposal on reviewing existing binders, making proposed changes and issuing new policies (4-month turnaround time). high level, spoked directly to what they do, OCIP very instrumental, impressive experience. Their approach directly related to DeKalb's day to day approach and specifically in OCIP.</p>
<p><b>Project Management</b></p> <p>a) Describe how the project will be organized and managed;                      b) Describe progress reporting procedures for the project;                      c) Include the anticipated use of subcontractors or vendors; and                      d) Describe the resources necessary to accomplish the purpose of the project.                      e) Describe the ability to meet insurance consulting needs such as, Exposure Identification, Loss Frequency and Severity Forecasts, Property Valuation; Establish Maximum Foreseeable Loss and Probable Maximum Loss estimates; Risk Loss Control Services, Claims Administration, Access to Quality Major Markets and Construction Wrap-up Services.</p>	<p>a) submitted a well defined plan on how the project will be organized and managed with step by step info                      b) monthly basis they will furnish comprehensive summary reports, on an annual basis they will provide a stewardship report chronicling loss experience with cost analysis, project earned premium and a summary of enrolled contractors, their estimated payroll and reported payroll                      c) Fulcro - OCIP administrator (has experience to actually perform the scope)                      d) provided.</p>	<p>a) 8 account executives with 3 team leads will be assigned. 24/7 dedicated team                      included program transition plan which consists of identification, analysis, strategy, implementation and monitoring/modifying                      b) reporting is from client to McGriff office                      c) no subcontractors will be utilized                      d) responsibilities will be shared amongst 2 offices (Atlanta and Texas). OCIP administration will be out of Birmingham.                      e) ability to provide additional services - not sure if this is an additional fee Develop on the fly, process should come with one</p>	<p>a) submitted a well defined plan on how the project will be organized and managed such as client first principle, marketing and execution, various client meetings, dedicated service team, and organizational qualifications for public entity. b) under communication page 20 they describe various ways of reporting. No preferred preference listed. Currently receive weekly reports of status. c) PMI Solutions. d) statement of Marsh will employ a diverse set of resources in order to achieve the County's goals. These resources are available to the project team without any internal charge-backs - we can have access to everything Marsh has to offer. e) detailed technical approach addressed these items.</p>

	Alliant Insurance Services	McGriff Insurance Services	Marsh & McLennan
<p><b>Personnel and Organizational Qualifications</b></p> <p>a. Identify the individuals who will be part of the project team</p> <p>b. Include any outside personnel, such as subcontractors; and</p> <p>c. Provide detailed resumes of team members and subcontractors who will be directly working on the project.</p> <p>d. Include experience of Broker Account Team, including support staff, size of Agency and how these line up to meet the County's needs. Describe experience in the following areas;</p> <ul style="list-style-type: none"> <li>• Exposure Identification</li> <li>• Loss Frequency and Severity Forecasts</li> <li>• Property Valuation</li> <li>• Establish Maximum Foreseeable Loss "MLF" and Probable Maximum Loss "PML" estimates</li> <li>• Risk and Loss Control Services</li> <li>• Claims Administration</li> <li>• Access to Quality Major Markets and Construction Wrap-up Services</li> </ul> <p><b>Organizational Qualifications:</b></p> <p>a. Describe Responder's experience, capabilities and other qualifications for this project;</p> <p>b. How many years has Responder operated under current company name?</p> <p>c. Has Responder ever been debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal department or agency from doing business with the Federal Government?</p> <p>d. Responding firms shall show evidence of providing Insurance Broker services for at least five (5) years and identify a minimum of five (5) governmental clients on the enclosed Agent/Broker Questionnaire provided as Attachment F. The selection of the Insurance Broker shall be based upon a comparative analysis of the following professional qualifications. Responders shall submit a Statement of Qualifications in the following format:</p> <p>e. General description of the firm including company history, size of company, affiliations with any other firms, experience with any public agencies of like size.</p>	<p>a) provided chart that is very well laid out showing roles, experience and function on the team.</p> <p>b) staff is mainly out of Charlotte with minimal local staffing.</p> <p>a) in business for 40 years, servicing over \$2.9 billion in public entity premiums</p> <p>b) 40 years</p> <p>c) good standing, no debarring</p> <p>d) completed on form F</p> <p>e) \$25.7 billion worldwide, 9100+ associates, 880+ offices,</p>	<p>a) provided chart of 5 teams with a wealth of knowledge showing everyone's role</p> <p>b) no subcontractors</p> <p>c) resumes didn't say a lot. Guess it provided the essentials of licenses, education, and previous companies worked for. Concerned about the Lead Personnel assigned to DeKalb, no OCIP experience.</p> <p>a) in business since 1886 - areas of expertise are casualty, property, professional liability, OCIP, worker's comp. Is the 6th largest insurance broker in the US and 7th in the world</p> <p>b) 136 years - started locally and does not rank in Top 100. Years of experience mostly from direct partnership.</p> <p>c) no debarment</p>	<p>a) provided</p> <p>b) licenses provided along with the team biographies, has experience in the public entity in the state of Georgia</p> <p>c) completed</p> <p>d) completed</p> <p>a) referred to project team resumes/bios submitted - dedicated service</p> <p>b) 150 years - #1 firm in the world</p> <p>c) no disbarment</p> <p>d) Marsh was founded over 150 years ago. Relevant Governmental client references listed in Attachment F</p> <p>e) Provided. Roots dating back to 1871 utilizing 83,000 colleagues around the world. For 150 years, they have grown by helping clients prosper amid changing times and technologies. Industry specialization in multiple sectors: agriculture, automotive, aviation, banking, real estate, etc.</p>
<b>Financials</b>	Alliant has negative equity, due to a restructure, cash and cash flow are very strong.	McGriff submitted Truist financials (sub company) of which Truist financial are strong.	Marsh & McLennan is a billion dollar company with strong financials.
<b>References</b>	Excellent References	Excellent References, No OCIP References	Excellent References, in addition to the comments from DeKalb Team's experience of their performance during the contract period.
<b>LSBE</b>	LSBE MSA Participation - 20% Fulcro Insurance of GA	Documented GFE (contacted 4 LSBEs)	LSBE MSA Participation - 20% PMI Solutions, LLC