

To: MARIE SULLIN, RISK MANAGER

Through: DEAN MEALY, PURCHASING MANAGER

From: PAMELA DALEY, SENIOR PROCUREMENT SPECIALIST 

Date: SEPTEMBER 2, 2016

Subject: AWARD RECOMMENDATION: RFP 743-16 INSURANCE BROKER OF RECORD FOR PROPERTY AND LIABILITY INSURANCE

Consistent with the City of Riviera Beach **Code of Ordinance (MUNICODE Section 16.5)**, a Request for Proposal (RFP) was advertised in the "**Legal Notices**" section of the Palm Beach Post on **April 24, 2016**, to solicit Broker of Record Services for the City of Riviera Beach Property and Liability Insurance.

To provide additional exposure and to ensure maximum competition for the project, it was also advertised on the City's internet web-page on **April 25, 2016**. Three (3) proposals were received.

On **June 30, 2016**, an evaluation committee consisting of the Director of Finance and Administrative Services, Assistant Finance Director, Risk Manager, Director of Human Resources, Industry Consultant, and Senior Procurement Specialist, convened to review and discuss the responses to the RFP for Broker of Record Services for the City of Riviera Beach Property and Liability Insurance Services.

Firms were evaluated in two (2) separate phases and ranked based on the criteria established in the City's RFP which included the following:

Evaluation Criteria – Phase I	Possible Points
The experience, resources, and qualification of the financial institutions and Individuals	15 points
Customer Service and problem resolution.	20 points
Innovation/Technology/Expanding P-card Solutions for best business approach.	25 points
Incentives, rebates or discounts offered based on business volume.	25 points
Proposed fees and compensation	15 points
TOTAL POSSIBLE SCORE	100 POINTS

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EVALUATION COMMITTEE RECOMMENDATION: RFP 743-16

Committee members shared their observations, and evaluated and scored the responses in accordance with their understanding of the written criteria established in the public solicitation.

Scores for the written proposal (**Phase I**) were tallied, and based upon a measure of average score, the firms ranked as follows:

FIRM	RANKING	AVERAGE SCORE
Arthur J Gallagher Risk	1	96.40
Gehring Group	2	95.40
Brown and Brown	3	93.00

In accordance with the RFP's evaluation process, the three (3) top ranked firms were "Shortlisted" and invited for oral presentations. On **June 18, 2016**, the three responsive firms were invited to give oral presentations before the committee to discuss their team and their ability to meet or exceed the service requirements of the City, the pros and cons of pooled risk and suggestions on how to reduce cost, their fees and qualifications of those persons that will be assigned to work with or Consult with the City on this project as listed below:

Evaluation Criteria – Phase II	Possible Points
Communication Skills: Discussing their ability to meet or exceed requested services	6 points
Presentation\Understanding of Project	6 points
Responses to Questions	3 points
TOTAL POSSIBLE SCORE	15 POINTS

Committee members shared their observations, and evaluated and scored the responses in accordance with their understanding of the oral presentation criteria established in the public solicitation.

Scores for the oral presentation (**Phase II**) were tallied, and based upon a measure of average score, the firms ranked as follows:

FIRM	RANKING	AVERAGE SCORE
Gehring Group	1	14.25
Arthur J Gallagher Risk	2	14.00
Brown and Brown	3	Decline to Participate

As a result of Phase I and Phase II evaluations, an **overall score** was calculated based on the sum of both evaluations. The results are:

EVALUATION COMMITTEE RECOMMENDATION: RFP 743-16

FIRM	PHASE I SCORE	PHASE II SCORE	OVERALL SCORE	RANK
Arthur J Gallagher Risk	96.40	14.00	110.40	1
Gehring Group	95.40	14.25	109.65	2
Brown and Brown	93.00	Decline to Participate	93.00	3

The evaluation process has validated that the proposal submitted by Arthur J Gallagher Risk satisfies the requirements established in the RFP and that the firm is qualified to be awarded the contract for the services identified in RFP #743-16.

The firm has substantial experience in providing the types of services required by the City, Arthur J Gallagher Risk is a national firm with an office in Miami, Florida, that specializes in providing Risk Management Services.

Accordingly, and consistent with the provisions of the solicitation, it is the consensus of the evaluation committee that the number one (1) ranked firm, Arthur J Gallagher Risk be recommended to provide Broker of Record for Property & Liability insurance for the City of Riviera Beach.

Attachments