

Review of Proposals
RFP 2-2257 Insurance Brokerage Services

ATTACHMENT A

Presented to the Finance and Administration Committee - June 8, 2022

Two proposals were received, two firms were interviewed, one firm is being recommended.

Overall Ranking	Proposal Score	Firm & Location	Sub-Contractors	Evaluation Committee Comments	Firm-Fixed Price for Five-Year Term
1	85	Marsh USA, Inc. Irvine, California	Insurance Tracking Services, Inc.	Comprehensive qualifications and experience with insurance brokerage services. Firm has experience providing insurance brokerage services in Orange County. Firm has been in business since 1871 and has 41,000 employees. Project manager has 34 years of industry experience in Southern California. Many key personnel have over 20 years experience with insurance brokerage services. Anticipating Orange County Transportation Authority's new and changing liability risk (cyber, property, rail, OC Streetcar, etc.) during current economic setting. References provided positive comments and feedback. Comprehensive interview.	\$670,000
2	79	Alliant Insurance Services, Inc. Irvine, California	N/A	Well-qualified firm with extensive experience related to insurance brokerage services. Firm has experience providing insurance brokerage services in Orange County. Proposed multiple project leads who specialize in different types of liability coverages. All proposed project leads work for only public entities in Orange County. Both proposed project managers have over 15 years of experience in the insurance industry. Work plan focused on unique insurance solutions which includes large pools for public entities. References provided positive comments and feedback. Did not identify insurance document tracking services. Did not address Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency required services.	\$502,000

Evaluation Panel:

Internal:

Contracts Administration and Materials Management (1)
Risk Management (1)

External:

Los Angeles – San Diego – San Luis Obispo Rail Corridor (1)
County of Orange (1)
City of Orange (1)

Proposal Criteria

Qualifications of the Firm
Staffing and Project Organization
Work Plan
Cost and Price

Weight Factors

30%
25%
20%
25%