

Review of Proposals
RFP 7-1585 Insurance Brokerage Services

Presented to the Finance and Administration Committee - May 10, 2017

Three proposals were received, Three 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	88	Marsh USA, Inc. Irvine, California	ITS Systems	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 over 28,000 employees. Project manager has 30 years of industry experience in Southern California. Many key personnel have 20 years experience with insurance brokerage services. Anticipating the Orange County Transportation Authority's (OCTA's) new and changing liability risk (cyber, property, rail, OC Street Car, etc.). References provided positive comments and feedback. Comprehensive interview.	\$520,000
2	82	Alliant Insurance Services, Inc. Newport Beach, California	Bedford Falls Insurance Services MyCOI	Well-qualified firm with extensive experience related to insurance brokerage services. Subcontractor to provide various activities and develop competitive markets for consideration. 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 include large pools for public entities. Did not identify the subcontractor who will conduct property valuations. References provided positive comments and feedback. Comprehensive interview.	\$521,755
3	75	Aon Risk Insurance Services West, Inc. Los Angeles, California	Arcina Risk Group LLC	Qualified firm with extensive experience related to insurance brokerage services. Firm has strong presence in the transportation industry. Project manager has 20 years of experience in property and casualty insurance market. Project manager and support staff have limited experience providing insurance services to transit agencies. Work plan does not offer property valuations for determining insurable values. Did not address reporting deliverables or services to update OCTA on regulation and legislative changes. References provided positive comments and feedback. Good interview.	\$580,000

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 Anaheim (1)

Proposal Criteria

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

Weight Factors

30 percent
25 percent
20 percent
25 percent