



**Interoffice Memorandum**

October 19, 2020

**TO:** Mayor Jerry L. Demings  
and the Board of County Commissioners

**FROM:**  Carrie Mathes, CFCM, CPPO, C.P.M., Manager, Procurement Division

**CONTACT:** John Petrelli, Director, Risk Management and Professional Standards  
Division  
(407) 836-9640

**SUBJECT:** Selection of Firm, Request for Proposals Y20-1061-TJ, Insurance Broker  
Services for Commercial Insurance Program

**RECOMMENDATION:**

Selection of Arthur J. Gallagher Risk Management Services, Inc. to provide Insurance  
Broker and Consulting Services, Request for Proposals Y20-1061-TJ.

Request authority for the Procurement Division to negotiate and execute a contract within  
a budget of \$615,000 for a three-year term. Further request authorization for the  
Procurement Division to renew the contract for two additional one-year terms.

Proposals were evaluated by the Procurement Committee on October 14, 2020.  
Commissioner Mayra Uribe was assigned to the Procurement Committee.

**PURPOSE:**

This contract will provide insurance broker and consulting services for placing insurance  
coverages and providing support services, including, but is not limited to, preparing  
submissions/specifications for underwriters, negotiating terms, conditions, and price,  
preparing renewal binders and invoices, reviewing policies and endorsements, and  
resolving coverage issues.

The Consultant will place coverage and provide support services for:

1. Property, including business interruption and extra expense;
2. Equipment breakdown and equipment floaters;
3. Commercial crime and public officials' faithful performance bonds;
4. Excess Workers' Compensation and Employers' Liability;
5. Excess Public Entity Liability, including auto, sexual harassment, etc.;
6. Cyber Insurance- including extortion and ransomware exposures;
7. Pollution Legal Liability and Storage Tank Liability;

Selection of Firm, Request for Proposals Y20-1061-TJ, Insurance Broker Services for Commercial Insurance Program

8. Tenant User Liability Insurance Program;
9. Workers' compensation for County boat patrol;
10. Liability for ReNEW grant program;
11. Builders' Risk and Special Events coverage as needed;
12. Corporate Counsel Professional Liability;
13. Accidental Death & Medical Payments policies for Corrections;
14. Special event coverage as needed;
15. Unmanned Aviation Coverage.

**APPROVALS:**

The Risk Management Division and Business Development Division concur with this recommendation.

**REMARKS:**

One proposal was received in response to this Request for Proposals (RFP). To ensure an open and competitive solicitation process, the RFP was posted on the Orange County website and the Negometrix portal. A query from staff to potential proposers that declined to compete on this solicitation resulted in the following responses:

1. Aon: Did not respond to the query.
2. Willis Towers Watson: Stated they were unaware of the solicitation opportunity due to local operations closure.
3. Votum Construction: Did not respond to the query.

The Procurement Committee evaluated the proposal in accordance with the criteria set forth in the RFP.

Selection of Firm, Request for Proposals Y20-1061-TJ, Insurance Broker Services for Commercial Insurance Program

The Procurement Committee's consensus scores are attached:

Procurement Committee Meeting - OCTOBER 14, 2020  
 Y20-1061-TJ, REQUEST FOR INSURANCE BROKER SERVICES FOR COMMERCIAL INSURANCE PROGRAM

CRITERIA	Qual of Staff	Qual of Staff	Technical Approach	Location	M/WBE	Dislocated Workers (B)	SDV (B)	Fee Proposal	Total Weighted Points
Weighted Value	20	20	20	10	10	5	15	20	120
.. (B) Indicates Bonus Points (Maximums Bonus Points Above)									
Arthur J. Gallagher Risk Management Services, Inc.	100	100	88	50	25	0	0	100	463



**INTEROFFICE MEMORANDUM**

September 8, 2020

TO: Todd Jackson, Contracting Agent  
Procurement Division

FROM: Kesi Warren, Senior Contract Administrator  
Business Development Division

SUBJECT: Business Development Division M/WBE Proposal Evaluation

PROJECT: Y20-1061-TJ, Orange County Insurance Broker Services

APPROVED: *Aheena Ferguson*

Below are the respondents to the subject RFP with their firm's certified Minority/Women Business Enterprise (M/WBE) sub-consultants, Minority Business Enterprise Workforce and Women Business Enterprise goals:

1. Arthur J. Gallagher Risk Management Services, Inc.  
MAJORITY PRIME

M/WBE Sub-consultant(s)	M/WBE Classification	Projected %	Sub-consultants Role
*None			

\*The Schedule of Sub-Contracting – M/WBE Participation Form, the proposer states "N/A"

Total M/WBE Participation Proposed: 0%

**M/WBE Sub consultant participation Weighted Score: 0**

Total M/WBE Workforce: 18%

Total WBE Workforce: 63%

**Minority Workforce and Women Workforce Weighted Score: 25**

**Total M/WBE Participation Weighted Score: 25**

Registered Service-Disabled Veteran(s) (SDV) Sub-consultant	Points	SDV Sub-consultant Role
*None		

\*The Schedule of Sub-Contracting – SDV Participation, the proposer states "N/A"

Registered SDV(s) Proposed: 0  
**SDV Bonus Points: 0**

Displaced Worker(s) Proposed: 0  
**Displaced Worker(s) Bonus Points: 0**

**Total Bonus Points: 0**  
*(Includes SDV & Displaced workers)*