City of Jacksonville, Florida

ONE CITY. ONE JACKSONVILLE.

Lenny Curry, Mayor

Division of Insurance and Risk Management
117 West Duval Street
Suite 335
Jacksonville, FL 32202
(904) 630-7521
www.coj.net

TO: **Gregory Pease, Chairperson, Professional Services Evaluation Committee**

FROM: **Twane Duckworth, Chief, Office of Risk Management**

Ann Willis, Property and Casualty Compliance Administrator

SUBJECT: **P-36-19 Property Broker Services RFP Evaluation**

DATE: **August 23, 2019**

Contract No. 8518-03 Property Insurance Brokerage Services allows for placement of Property Insurance Brokerage Service (Property, Boiler and Machinery, and Terrorism, etc.) in the Scope of Services. The current term is from March 1, 2019 to February 29, 2020 with no remaining renewals.

Risk Management prepared and advertised Request for Proposals ("RFP") P-36-19 on June 3, 2019. Risk received five (5) responses from the bid opening on Wednesday, June 26, 2019. Those responders were (in alphabetical order) as follows: A.J. Gallagher Risk Management Services, Inc, Alliant Insurance Services, Inc., Brown & Brown of Florida, Inc, Cecil W. Powell & Company, and Harden & Associates, Inc.. Two (2) of the five (5) responses were not evaluated due to the following:

Cecil W. Powell & Company's response was not evaluated per RFP Section 1.4(1) which states:

1.4 Minimum Requirements for Contractors.
Consultant/Firm must satisfy the following mandatory minimum requirements in order to have their Responses evaluated. By submitting a Consultant warrants and represents that it satisfies these requirements. Failure to meet these requirements will result in the Response not being evaluated and being rejected as non-responsive:

1) The Contractor shall provide current proof of all business licenses required by local, state, and federal law as applicable.

No Copies of business licenses were submitted as part of Cecil W. Powell & Company's response.

A.J. Gallagher Risk Management Services, Inc.'s response was not evaluated per RFP Section 2.4 which states:

2.4 Submission of Responses.
A. The location and deadline for submitting Responses is set forth in Section 1 of the RFP. Contractors are fully responsible for meeting these requirements. Reliance upon mail or public carrier is at Contractor's risk. **Late bids will not be considered.**

ONE CITY. ONE JACKSONVILLE.

City of Jacksonville, Florida

Lenny Curry, Mayor

Division of Insurance and Risk Management
117 West Duval Street
Suite 335
Jacksonville, FL 32202
(904) 630-7521
www.coj.net

B. Contractor shall submit:
1) One (1) original signed version of its Response clearly marked as "ORIGINAL." The Response must be signed by an officer or employee having authority to legally bind Consultant.
2) Two (2) hard copies of the entire Response.
3) Six (6) scanned copies (in .pdf format) of entire Response, each on a separate USB Flash Drives Large files may be scanned as several separate PDF files.
4) One (1) REDACTED scanned copy of the Response (if necessary pursuant to Section 2.12). This copy should be marked "Confidential – Trade Secret" or something comparable to alert the reader of Consultant's claim of a public records exemption.

All copies are to be placed in a sealed package. The outside must be marked with (i) the RFP title and number, and (ii) Contractor's name, address, contact person, and telephone number.

It is the sole responsibility of each Contractor to assure all copies are EXACT duplicates of the original Response. Photocopies or Flash Drives copies will be used for the purpose of evaluating the Responses. Any information contained in the original Response which has not been transferred to the flash drives or photocopies will NOT be considered. The original document will be used solely for official record keeping and auditing purposes.

All six (6) Flash Drives that were submitted by A.J. Gallagher Risk Management Services, Inc. were blank.

The remaining three (3) responses were evaluated and have been ranked as follows:

1. Brown & Brown of Florida, Inc.
2. Alliant Insurances, Inc.
3. Harden & Associates, Inc.

We respectfully request that the above list be forwarded to the Mayor's office for final selection.

Attachment A – Scoring Matrix

Evaluation Matrix

EVALUATION SCALE

1----------25

QUALIFIED EXTREMELY QUALIFIED

PROJECT NO. **P-36-19** Average

PROJECT TITLE: **Property Insurance Brokerage Services**

FIRM	COMPETENCE	CURRENT WORKLOAD	FINANCIAL RESPONSIBILITY	ABILITY TO OBSERVE COMPLIANCE WITH PLANS	PROFESSIONAL ACCOMPLISHMENTS RECORD	PROXIMITY TO PROJECT	Past & Present Demonstrated Commitment to Small & Minority Businesses & Contributions Toward A Diverse Market Place	ABILITY TO DESIGN AN APPROACH AND WORK PLAN	Willingness to meet both time & budget	VOLUME OF CURRENT AND PRIOR WORK FOR USING AGENCIES	OVERALL
MAXIMUM POINTS	25	5	10	5	5	5	10	20	10	5	**100**
Alliant Insurance Services, Inc.	13.50	5.00	10.00	4.50	4.00	2.50	9.00	16.00	10.00	3.00	**77.50**
Brown & Brown of Florida, Inc.	21.50	4.00	10.00	5.00	5.00	5.00	10.00	17.50	5.00	1.50	**84.50**
Harden & Associates, Inc.	19.00	4.50	3.00	4.00	3.00	5.00	9.00	16.00	4.00	2.00	**69.50**