



RFP PS 24-0412  
Insurance Brokerage and Related  
Consulting Services

August 29, 2024 – 1:00 p.m.  
Via WebEx

**City of Phoenix**  
Finance Department



# Housekeeping

- Please mute your microphones, unless you are speaking, to mitigate background noise and potential electronic feedback for the other participants.
- We will be touching on various sections of the solicitation, please try and limit your questions to the section being discussed.
- Please email your company name, first and last name, telephone number, and email address to the procurement officer: [karen.zinn@phoenix.gov](mailto:karen.zinn@phoenix.gov)



# Legal Notice

The purpose of the Pre-Offer Conference is to provide a casual atmosphere to discuss the City's intent and to determine whether the City's requirements are clearly stated.

Although an exchange of information may take place, the official position of the City is that which is delivered in the solicitation document and in the form of a written Solicitation Addendum. Therefore, nothing said here today should be construed as a change to the written requirements in the solicitation document.

Any changes will be in the form of a solicitation addendum. Vendors must acknowledge receipt of any/all addenda by signing and returning the document with their submittal, or the response may be considered non-responsive.

Please note that it is the responsibility of the Offeror to read the entire solicitation document. Offerors must contact the Procurement Officer if they have any questions – no other City employees per the Transparency Policy.



# Key Dates

Pre-Offer Conference

August 29, 2024  
at 1:00 p.m.

Written Inquiries Due

September 5, 2024  
at 1:00 p.m.

Offer Due Date

September 12, 2024  
at 1:00 p.m.



# Agenda

## RFP PS 24-0412 Insurance Brokerage and Related Consulting Services

1. Review the Scope of Work
2. Review Pricing Proposal
3. Review Minimum Qualifications
4. Review Solicitation Instructions
5. Review Terms and Conditions
6. Review Insurance Requirements
7. Review Submittal Requirements
8. Closing



# Scope of Work

This contract will provide City of Phoenix, Finance Department, Risk Management Division with insurance brokerage and related consulting services. The Risk Management Division arranges insurance coverage for City of Phoenix and its departments, agencies, boards and commissions and their officers, agents and employees for property, liability and workers' compensation losses in accordance with the statutory provisions found in A.R. 3.51.



# Scope of Work

- **Scope of Work / General Requirements (Pg 53)**

Part 1 – Property & Casualty Insurance Services;

Part 2 – Surety Bond Services

Proposals may be submitted for Property and/or Casualty Insurance, and/or Surety Bond Services

- Part 1.1 and 1.2 address placement of existing Property and Casualty insurance policies as well as the potential need for new types of policies in the future.
- Part 1.3 identifies the services to be provided as part of the annual flat fee plus an hourly rate for services in excess of those listed in the Scope of Work.
- Part 2 addresses the Surety Bond Placement requirements and related services.
- Additional services may be identified and offered at an hourly rate.
- Attachment 1 to Scope of Work is a reference list of all policies in force at this time.



# Pricing Proposal Part 1

## PART 1.1, 1.2 and 1.3 - PROPERTY/CASUALTY - EXISTING and NEW POLICIES

Item No.	Service	Annual Flat Fee - Property and Casualty	Annual Flat Fee - Property Only	Annual Flat Fee - Casualty Only	Commission % - New Policies	Hourly Rate
1	Year 1 - Policies in 1.1 with Services in 1.3					
2	Year 2 - Policies in 1.1 with Services in 1.3					
3	Year 3 - Policies in 1.1 with Services in 1.3					
4	Year 4 - Policies in 1.1 with Services in 1.3					
5	Year 5 - Policies in 1.1 with Services in 1.3					
6	Year 2-5 NEW Policies - Part 1.2 in Scope					
7	Additional Services					





# Pricing Proposal Part 2

## PART 2 - SURETY BOND PLACEMENT

Item No.	Service	Flat Fee per bond	Commission % per bond	Hourly
1	Notary Bond and Related Services			
2	Condemnation Bond and Related Services			
3	Public Official Bond and Related Services			
4	Additional Services			



# Minimum Qualifications

## **RFP Section 1.3 Minimum Qualifications (Page 7)**

### **Minimum Qualifications**

- Shall be a licensed Insurance Broker.
- Shall maintain a business presence in the State of Arizona and offer an assigned area Account Executive.
- Shall have access to national and international markets.
- Shall have public entity experience with clients employing at least 5,000 employees in all lines of property and casualty insurance.



# Solicitation Instructions

Transparency Policy in Effect (RFP 1.18, page 11)

- All Communication through Procurement Officer
- Posting of Solicitation through Council Approval

All offerors must register at: <https://www.phoenix.gov/procure>.

Businesses ***must*** be registered with the Arizona Corporation Commission (this is checked) or assert a statutory exception.



# Solicitation Instructions

- Solicitation Inquiries ([email procurement officer only](#))
- Preparation Of Offer
  - All Forms in Submittal Section Must be Submitted.
  - No Modifications to the Submittal Forms
- Exception to Solicitation Requirements
  - Exceptions are allowed (see RFP Section 1.8 – Page 8)
  - All offers shall be firm and fixed for a period of 180 calendar days from the Offer Due Date.
- Submission of Offer (see RFP Section 1.13 – Page 9)
  - Electronic Submittal
  - Late Offers (see RFP Section 1.21 – Page 14)



# Evaluation Criteria

## **Evaluation Criteria**

### 1000 Points Maximum

- Qualifications and Experience, including Resumes & References (500 Points)
- Method of Approach (300 Points)
- Pricing (200 Points)



# Evaluation Process

## Responsiveness

Offers will be reviewed for documentation of minimum qualifications, completeness and compliance with the solicitation requirements.

- Non-responsive offers will not be considered in the evaluation process.

## Evaluation

1. Initial Evaluation: The overall consensus scores will determine the Offeror's ranking and which Offers are within the competitive range.
2. Discussions with Offerors in Competitive Range: Offerors in the competitive range may be asked to provide clarification and/or participate in interviews.
3. Best & Final Offers (if applicable): Offerors in the competitive range may be afforded the opportunity to amend its offer.
4. Award Recommendation: The evaluation panel will recommend the Offer that is the best value and most advantageous to the City based on the evaluation criteria.



# Terms of Contract

- Five Years with no options to extend
- Pricing – firm and fixed
- Note RFP 2.6.3 re: Sources of broker compensation and disclosure of contingent fees at time of quote.
- Confidentiality and Data Protection found at RFP 2.6.27-28.



# Insurance & Indemnification

- Please note the indemnification provisions within the solicitation
- Insurance requirements cover (as applicable):
  - General liability
  - Automobile liability
  - Worker's compensation
  - Professional liability
- Upon award, certificates of insurance (ACORD form or equivalent) must be provided to the City within 10-days
- Send to the Procurement Division at [procurement@phoenix.gov](mailto:procurement@phoenix.gov)





# Submittals

The written offer must be:

- Signed by an authorized representative of the Offeror.
- Submitted with contact information for the individual(s) authorized to negotiate with the City.

**INCLUDE:**

- A. Offeror's Proposal - A detailed proposal describing the firm or individual's qualifications and experience responsive to the requirements of the solicitation, minimum qualifications, and evaluation criteria.
- B. Pricing Proposal - A completed pricing proposal with all requested prices related to your offer.
- C. Submittal Forms - All submittal forms are completed and signed.
- D. Addenda - Signed complete copies of all published addenda (not just the signature page)



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**IMPORTANT  
INFORMATION**

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