

A large, stylized, light blue Phoenix logo is centered in the background of the slide. The logo depicts a bird with its wings spread, perched on a circular base. The background is a solid dark blue color.

# RFQu-25-0552

## Claims Adjusting, Damage Appraisal, and Subrogation Services

February 19, 2025, at 2:00 p.m.  
Via WebEx

**City of Phoenix**  
Finance Department



# Housekeeping

- Please turn off or silence cell phones during this pre-offer conference.
- 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 each major section 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: [william.langbehn@phoenix.gov](mailto:william.langbehn@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

February 19, 2025,  
at 2:00 p.m.

Written Inquiries Due

February 26, 2025,  
at 2:00 p.m.

Offer Due Date

March 12, 2025,  
at 2:00 p.m.

All times are local Phoenix time.



# Agenda

RFQu-25-0552

## Claims Adjusting, Damage Appraisal, and Subrogation Services

1. Review Solicitation Instructions
2. Review the Qualifications Criteria (2.15.)
3. Review Special Terms and Conditions
4. Review Insurance and Indemnification Requirements
5. Review the Scope of Work
6. Review the Evaluation Process
7. Review Submittal Requirements
8. Closing



# Solicitation Instructions

- Transparency Policy starts at solicitation opening and ends at Council Award
- All offerors must register at:  
<https://www.phoenix.gov/procure>
- All written inquiries are due **February 26, 2025, by 2:00 p.m.**
- The City will not be responsible for oral instructions made by employees or officers, any changes will be in the form of solicitation addenda
- Businesses ***must*** be registered with the Arizona Corporation Commission (this is checked)
- Offeror must read the entire solicitation and accept all terms and conditions without exception



# Qualification Criteria (2.15.)

- B. Offerors are reminded that the qualifications, and other requirements herein, are minimum requirements and that offers submitted must be for services that meet or exceed the minimum standards described in this RFQu.
1. Offerors must be licensed to conduct business in the State of Arizona. Its employees assigned to work under this contract must have the Arizona Insurance Adjuster's license and be in good standing with Arizona Department of Insurance. Offerors must submit copies of licenses with the proposal.
  2. Offerors must have and maintain an office in the Phoenix Metropolitan area.
  3. Offerors must submit staffing resources as a part of the Statement of Qualifications (provide resumes for key staff)
  4. Offerors must submit a minimum of 3 references from prior clients which the Contractor is currently furnishing or has furnished, completed service for liability claim adjustment, subrogation services, or vehicle damage appraisal services. (Reference Submittals - References rev 2-2023)
  5. Offeror must demonstrate being in business a minimum of five years offering service(s) for each service category offer is submitting for, see the service categories Items 3.1.A.1. - 3.1.A.7..
  6. Offerors must submit a claims status report sample.
  7. Offerors may submit proposal for one or more of the services requested.
  8. Notice of Representation: Offeror will act on behalf of the City on claims submitted for damage recovery, with the City's approval required for settlement below original estimate costs.
  9. Debt Collection: Offeror is not a debt collector; those claims will be directed back to the City Risk & Revenue Division.



# Special Terms & Conditions

- Pricing shall be firm and fixed for the initial year of the contract, thereafter price increases will be considered annually.
  - Any increases granted are solely at the discretion of the City
- No Miscellaneous Fees (Reference 3.13. and 6.16.)
- Liquidated Damages \$1000.00 (Reference 6.26.)
- Background screening of all contract employees is required, and the City has set this contract at the Maximum Risk Level.
- CJIS Security Addendum (Reference 6.50. – if applicable)
- Please pay special attention to the Confidentiality and Data Security provisions within the solicitation (Reference 6.51. & 6.52.)
- Intellectual Property Rights (Reference 6.54.)





# Insurance & Indemnification

- Please note the indemnification provisions within the solicitation
  - Standard General Defense and Indemnification
  - Professional Services
- Insurance requirements cover:
  - Commercial General Liability
  - Automobile Liability
  - Worker's Compensation and Employers' Liability
  - Professional Liability (Errors and Omissions 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)



# Scope of Work

- A. An offeror must submit for one or more of the following service categories:
  1. Full-Service Liability Claim Adjusting - Excluding Water Main Breaks, Sewer Backups, police enforcement claims and all employment related claims.
  2. Full-Service Liability Claim Adjusting - For Water Main Breaks or Sewer Backups
  3. Damage recovery services for vehicle-related losses, including loss of use, revenue, and value.
  4. Full-Service Property Claims Adjusting - For 1st party and 3rd party claims.
  5. Subrogation and Recovery services for all property and liability claims, as required.
  6. Limited Adjustment Services
  7. Vehicle Appraisal Services



# Scope of Work (2)

The chart below shows the general methodology used to determine whether a claim is handled in-house, assigned to an independent adjuster, or assigned directly to a private investigator.

Type of Claim	In-house	Independent Claims Adjusting Firm	Private Investigator
Auto & General Liability Property Damage Only	X	X (Overflow & those requiring field work)	
Auto & General Liability Bodily Injury only or Bodily Injury and Property Damage combined	X	X	
Property Damage 1 <sup>st</sup> and 3 <sup>rd</sup> party claims		X	
Water Main Break and Sewer Backup Claims		X	
Catastrophic injury and complex liability Issues			X
Police Liability, Roadway Design/ Operation Liability claims involving serious injuries or fatalities			X



# Evaluation Process

The Evaluation Criteria is divided into two sections:

1. MINIMUM QUALIFICATION CRITERIA

- A. These minimum qualifications must be included, otherwise the offeror may be deemed non-responsive

2. Requirements and Services

Both sections are Pass / Fail

Please also review Section 2. Instructions.

In particular:

- Qualification Criteria (2.15.)
- Content of Response (2.16.)



# Submittals

- Please submit one electronic copy of the Submittal Section and all other required documentation.
  - Please submit only the Submittal Section, do not submit a copy of the entire solicitation document.
- Be sure to complete and include:
  - A. Statements of Qualifications - A detailed statement describing the firm or individual's qualifications and experience responsive to the requirements of the solicitation and evaluation criteria.
  - B. Pricing Proposal - A completed pricing proposal with all requested prices, quantities, and/or discounts completed.
  - C. Submittal Forms - **All** submittal forms are completed and signed.
  - D. Addenda - Signed copies of all published addenda
- Be sure to include references, as these are also checked
- This Offer will remain in effect for a period of 180 calendar days from the opening date and is irrevocable unless it is in the City's best interest to release offer(s).



# Key Dates

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INFORMATION**

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