

# MANATEE COUNTY GOVERNMENT SOURCE SELECTION

<b>SUBJECT</b>	RFP #121220FL – Property & Casualty Insurance Agent of Record for Excess Property & Insurance	<b>DATE POSTED</b>	December 12, 2012 <i>ML</i>
<b>PURCHASING REPRESENTATIVE</b>	Frank Lambertson, 749-3042	<b>DATE CONTRACT SHALL BE AWARDED</b>	December 19, 2012 or there after
<b>DEPARTMENT</b>	Financial Management Dept./Purchasing Div.	<b>CONSEQUENCES IF DEFERRED</b>	N/A
<b>SOURCE RECOMMENDATION</b>	First Florida Insurance Brokers	<b>AUTHORIZED BY DATE</b>	Melissa M. Wendel, CPPO Purchasing Official, 12/12/2012 <i>ML</i>

### ACTION DESIRED

Approval to enter into negotiations with First Florida Insurance Brokers, Tampa, FL to perform professional services as the Insurance Agent of Record who shall solicit insurance coverage proposals for the County on an as required basis.

### ENABLING/REGULATING AUTHORITY

Federal/State law(s), administrative ruling(s), Manatee County Comp Plan/Land Development Code, ordinances, resolutions, policy.)

Manatee County Code of Laws

### BACKGROUND/DISCUSSION

- Negotiated agreement would provide the professional services of an Agent of Record who shall solicit insurance coverage proposals and programs from interested markets. The goal of these services shall be to evaluate and recommend the most effective risk-financing program in terms of protection and cost
- FFIB is registered in the State of Florida and professionally competent to perform and render the services stated in the RFP.
- Proposals were received from the following firms:

**Local firms:**

BB&T Insurance Services, Inc., Bradenton, FL  
First Florida Insurance Brokers (FFIB), Tampa, FL

**Other firms:**

Public Risk Insurance Agency (PRIA), Daytona Beach, FL  
Arthur J. Gallagher Risk Management Services, Orlando, FL

See Page 2

### SUMMARY

**Recommend negotiations with First Florida Insurance Brokers, Tampa, FL**

<b>ATTACHMENTS:</b> (List in order as attached)	<b>INSTRUCTIONS TO BOARD RECORDS:</b>		
1. Approval Email Ed Hunzeker	N/A		
<b>COST</b>	\$125,000 - \$300,000 Annual Est.	<b>SOURCE (ACCT# &amp; NAME)</b>	505 0001200 531000
<b>COMMENTS</b>	N/A	<b>AMT./FREQ. OF RECURRING COSTS (ATTACH FISCAL IMPACT STATEMENT)</b>	N/A

- 5/21/12 – 11/14/2012 the appropriate proposal procedures were followed. The Request for Proposal (RFP) was broadcast via DemandStar, advertised locally in the Bradenton Herald, posted on the County's website and provided to the Manatee County Chamber of Commerce for release to its members.

- The Evaluation Committee consisted of:

Jan Brewer, Financial Management Department  
James Cooney, County Attorney's Office  
Frank Lambertson, Financial Management Department/Purchasing Division  
Michael Terrell, Risk Management Division (non-voting member)

- The Evaluation Committee convened on 9/26/2012 and determined that all proposers should make an oral presentation.
- The Evaluation Committee convened on 10/25/2012 and 10/26/2012 to hear oral presentations from the proposers.
- The Evaluation Committee convened on 11/14/2012 to discuss the offers based on the stated requirements in the RFP and in order to continue the acquisition process and make a recommendation to the County Administrator.

First Florida Insurance Brokers (FFIB), Tampa, FL – The firm presented its professional capabilities in a clear and concise manner via their proposal and presentation demonstrating the team's exceptional qualifications. Of particular importance are the firm's past experience in providing the necessary customer service to the County, its implementation plan, management experts in the field, a willingness to work with the County to meet our insurance needs and should an event occur the knowledge that FFIB will be there to support the County.

Public Risk Insurance Agency (PRIA), Daytona Beach, FL – The firm submitted an informative proposal detailing their qualifications and their lead presenter made a very knowledgeable and positive oral presentation to the committee. The committee's concerns were the firm's ability to provide the necessary customer service support to the County and if the savings proposed via reduction in coverage could be achieved.

Arthur J. Gallagher Risk Management Services, Orlando, FL – The firm submitted a satisfactory proposal and made a good presentation with their team detailing its experience, unfortunately the team leader was unable to attend the presentation. The Gallagher team addressed issues that they thought would assist the County in improving its insurance coverage, however overall the Evaluation Committee did not evaluate the firm as high as the firms above.

BB&T Insurance Services, Inc., Bradenton, FL – The Evaluation Committee felt the firm's proposal was just satisfactory and its oral presentation was not on par with the other three firms. Much of the experience for the required services was based in Texas which was a concern to the Evaluation Committee.

- The above justifications are a generalized summary of major observations intended only to give the Administrator a sufficiently detailed overview of the main observations of a majority of Committee Members. Each Committee Member may have considered one or more facts or factors more or less important than other Members when voting, and this summary of the Committee's ranking decision is not an attempt to exhaustively describe each of the relevant factors which motivated each of the Members to select the rankings described.
- The Evaluation Committee voted 3-0 to proceed with First Florida Insurance Brokers, Tampa, FL
- Estimated expenditure 125,000 to 300,000 (based on policy amounts and cost).
- Fund Source: 505 0001200 531000 (Self Insurance)

Re: Authority to Negotiate - RFP #12-1220FL - Property and Casualty Insurance Agent of Record  
Services for Excess Property and Insurance

Ed Hunzeker

to:

Melissa Wendel

12/07/2012 02:25 PM

Cc:

"Frank Lambertson", "Dennis Wallace", "Mickey Palmer"

Show Details

Please proceed as directed by the CAO.

Sent from my iPhone

On Dec 6, 2012, at 4:21 PM, "Melissa Wendel" <[melissa.wendel@mymanatee.org](mailto:melissa.wendel@mymanatee.org)> wrote:

Mr. Hunzeker,

We are communicating the recommended selection of **FIRST FLORIDA INSURANCE BROKERS of Tampa, Florida** to provide **Property and Casualty Insurance Agent of Record Services for Excess Property and Insurance**.

Upon your approval of the recommendation of the Evaluation Committee, staff will proceed with the posting of the selection and begin negotiations. If you choose, you may direct staff to present this recommendation to the Board of County Commissioners for consideration.

Thank you,  
Melissa

Melissa M. Wendel, CPPO  
Purchasing Official  
Manatee County Purchasing Division  
941-749-3054

----- Forwarded by Melissa Wendel/MCG on 12/06/2012 04:18 PM -----

From: Frank Lambertson/MCG  
To: Melissa Wendel/MCG@MCG  
Cc: Dennis Wallace/MCG@MCG  
Date: 12/04/2012 01:25 PM  
Subject: Authority to Negotiate - RFP #12-1220FL - Property and Casualty Insurance Agent of Record  
Services for Excess Property and Insurance

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Melissa:

Have included comments from Dennis.

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Fund Source: 505 0001200 531000 (Self Insurance)

Frank G. Lambertson, Contracts Negotiator  
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