

**Lee County Board Of County
Commissioners
Agenda Item Summary**

Blue Sheet No. 20060700

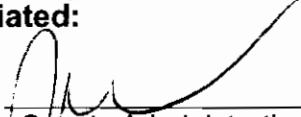
1. ACTION REQUESTED/PURPOSE:

Award RFP-06-02 PROPERTY, LIABILITY AND WORKMEN'S COMPENSATION INSURANCE AGENT to the Proposer whose proposal was evaluated by the Evaluation Committee as being in the best interest of Lee County, to BROWN & BROWN PUBLIC RISK INSURANCE AGENCY for a not-to-exceed expenditure of \$150,000.00 for FY 06-07. Brown and Brown will be appointed to act as agent of record effective June 17, 2006, for the purpose of marketing Lee County property, liability and workers' compensation self-insurance services renewal, which will become effective October 1, 2006, with subsequent renewals (annually October 1 – September 30) for a possible contract period of five (5) years. Arthur J. Gallagher & Co will handle all transactions associated with the property, liability and workers' compensation self-insurance policies, currently in place which expires, Sept 30, 2006.

2. WHAT ACTION ACCOMPLISHES: Provides Lee County with an Insurance Agency of Record for Property, Liability and Workmen's Compensation insurance.

3. MANAGEMENT RECOMMENDATION: Staff recommends approval.

4. Departmental Category: 01 **CIB** **5. Meeting Date:** **06-20-2006**

6. Agenda:		7. Requirement/Purpose: (specify)		8. Request Initiated:	
<input checked="" type="checkbox"/> Consent		<input type="checkbox"/> Statute		Commissioner	
<input type="checkbox"/> Administrative Appeals		<input type="checkbox"/> Ordinance		Department	County Administration
<input type="checkbox"/> Public		<input checked="" type="checkbox"/> Admin. Code	AC-4-4	Division	Risk Management
<input type="checkbox"/> Walk-On		<input type="checkbox"/> Other		By:	Pete Winton, Asst. County Mgr.

9. Background:

The Division of Risk Management submitted a request to Contracts Management to obtain proposals for RFP-06-02 PROPERTY, LIABILITY AND WORKMEN'S COMPENSATION INSURANCE AGENT. The deadline for receipt of the proposals was May 1, 2006. The Proposal Evaluation Committee consisted of: Pete Winton, Chairman, County Administration, Wayne Fiyalko, Risk Management, and Antonio Majul, Budget Services.

A total of six (6) proposals were received by the established deadline. All six (6) proposals were considered at the Proposal Evaluation Committee meeting held on May 11, 2006. After review of the proposals, the Committee narrowed the selection to the following three (3) proposals: Arthur J. Gallagher & Co., Brown & Brown Public Risk Insurance Agency, and Employers Mutual, Inc.

Based on the Evaluation Criteria established in the RFP, it was the consensus of the Committee to recommend award to Brown & Brown Public Risk Insurance Agency.

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10. Review for Scheduling:

Department Director	Purchasing or Contracts	Human Resources	Other	County Attorney	Budget Services				County Manager/P.W. Director
	<i>6/15/06</i>	N/A		<i>TD</i>	Analyst	Risk	Grants	Mgr.	<i>6-6-06</i>
					<i>6/17/06</i>	<i>6/17/06</i>	<i>6/18</i>	<i>6/17/06</i>	

11. Commission Action:

- Approved
- Deferred
- Denied
- Other

RECEIVED BY COUNTY ADMIN: <i>TD</i>
<i>6-6-06 11:20 AM</i>
COUNTY ADMIN FORWARDED TO: <i>AP</i>
<i>6/18/06</i>
<i>SPM</i>

Rec. by CoAtty
Date: <i>6/16/06</i>
Time: <i>11:00 AM</i>
Forwarded To: <i>Admin 6/16/06</i>

9. Background:(Continued)

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Brown and Brown will be appointed to act as agent of record effective June 17, 2006, for the purpose of marketing Lee County property, liability and workers' compensation self-insurance services renewal, which will become effective October 1, 2006, with subsequent renewals (annually October 1 – September 30) for a possible contract period of five (5) years. The five (5) year fee structure for property and casualty insurance broker services as requested is:

2006-7:	\$150,000
2007-8:	\$150,000
2008-9:	\$155,000
2009-10:	\$160,000
2010-11:	\$165,000

The 3rd-5th year fees contemplate a 3% inflationary increase and utilize rounding to the nearest \$5,000.

Funding will be available in account string: GC5133857700.503190

Attachment: 1) Lee County Proposal Evaluation Sheet

**LEE COUNTY
2006 PROPERTY/CASUALTY AGENT QUALIFICATIONS**

Agent Firm City Telephone Number Fax Number E-mail	1 Agent/Representative 2 Number of Years Agent in Insurance Business 3 Number of Years with Present Firm 4 Number of Public Entities Served 5 Number of Florida County Clients Served 6 Provide the Scope of Agent Services Outlined 7 Commit to Proactive & Aggressive Negotiation 8 Firm 9 Years Firm in Business 10 Which Florida office will service Lee County? 11 Any Other Offices Involved 12 Number of Florida Public Entities Served 13 Number of Florida County Clients Served 14 Firm Florida Premium Volume 15 Percentage of Firm's Business Public Entities 16 17 Other Persons Designated to Service Account 18 Name 19 Types of Licenses 20 Years Serving Large Commercial Accounts 21 Years of Serving Public Entities 22 Name 23 Types of Licenses 24 Years Serving Large Commercial Accounts 25 Years of Serving Public Entities 26 Name 27 Types of Licenses 28 Years Serving Large Commercial Accounts 29 Years of Serving Public Entities 30 Name 31 Types of Licenses 32 Years Serving Large Commercial Accounts 33 Years of Serving Public Entities 34 35 Amount of errors and omissions insurance	Judith Arenz, CPCU, RMPE Arthur J. Gallagher Boca Raton 800 239-8454 561 995-6708 judy_arenz@aig.com	Paul Dawson Brown & Brown Lake Mary 321 832-1504 321 832-1513 pdawson@publertsk.com	Bill McCreary, JD, CPCU Employers Mutual, Inc. Stuart 772 287-7650 772 287-1387 bill.mccreary@emi-tpa.com
	34 years 7 years 12 4 Yes Yes Yes	11 years 11 years 50 14 Yes Yes Yes	35 years 15 years 23 3 counties and 9 school boards Yes Yes	
	79 years Boca Raton Ft. Myers 59 7 \$110,000,000 80% public entity	67 years Lake Mary Daytona Beach Over 300 27 PRLA \$37,000,000 100%	21 years Stuart No 23 3 counties and 9 school boards \$50,000,000 85%	
	Michaelene Shiley General Lines, Property/Casualty 20 years 15 years James Greene Life, Health & Variable Annuity 15 years 5 years James Smith Certified Safety Professional 20+ 20+ Barton Douglas Associate in Claims Advocacy 20+ 20+ \$20,000,000	Michelle Martin 220 10 years 5 years Ann Hansen 220, 120 23 years 4 years Linda Burrehett \$220 20 years 5 years Phil Adams, CIC MacDuff Und 220, 120 (E&S) 18 years 5 years \$20,000,000	Tim McCreary 220, CPCU 6 years 6 years Kevin Smith 220 17 years 17 years Marsha Hulfstetter 220 18 years 15 years \$1,000,000	

LEE COUNTY 2006 PROPERTY/CASUALTY AGENT QUALIFICATIONS

Agent Firm City Telephone Number Fax Number E-mail	Lee County Property/Excess Property Toll Bridge Miscellaneous Bridges, Piers, Ramps Boiler and Machinery Excess Employee Dishonesty/Crime Excess General and Auto Liability EMS/Nurse Liability Excess Public Officials and Employment Practices Liability Storage Tank Pollution Liability Environmental Impairment Liability Excess Workers Compensation Parole Officers AD&D Total (If Flat Fee)	% up to Maximum	% or Flat Fee
Judith Arenz, CPCU, RMPE Arthur J. Gallagher Boca Raton 800 239-8454 561 995-6708 judy_arenz@ajg.com	3% \$100,000 3% \$25,000 3% \$25,000 3% \$1,000 3% \$500 3% \$15,000 3% \$1,000 3% \$5,000 3% \$1,000 3% \$1,000 3% \$10,000 3% \$500 \$195,000	3% 3% 3% 3% 3% 3% 3% 3% 3% 3% 3% 3% 3%	10% Included 10% Included 10% Included 10% Included 10% Included 10% Included 10% Included 10% Included 10% Included 10% Included 10% Included 10% Included 10% \$150,000
Paul Dawson Brown & Brown Lake Mary 321 832-1504 321 832-1513 pdawson@publicrisk.com	Included Included Included Included Included Included Included Included Included Included Included Included Included	Not to Exceed	
Bill McCreary, JD, CPCU Employers Mutual, Inc. Stuart 772 287-7650 772 287-1387 bill.mccreary@emi-tpa.com	10% Included 10% Included 10% Included 10% Included 10% Included 10% Included 10% Included 10% Included 10% Included 10% Included 10% Included 10% Included 10% \$150,000	10% 10% 10% 10% 10% 10% 10% 10% 10% 10% 10% 10% 10%	

Reasons for qualifying your firm	Number of Years Remuneration Guaranteed	Will remuneration be included in premiums?
Customers & References, Domestic & International Insurers, Unique Products, Claims Advocacy, Loss Control, Dedicated Insurance Professional for Public Sector/Scholastic clients.	3 years	If percentages, included.
Lee County Hillsborough County Palm Beach County School District of Palm Beach County School District of Escambia County		
PRIA is 100% Dedicated to Public Entity Sector, Florida based Company, Never accepted contingent commissions, Underwriter for PGIT, Unique Markets (PGIT)	2 years	Net premiums will be proposed with agent fee separate.
City of Naples City of Pensacola Marion County & City of Ocala City of Cape Coral City of Ft. Myers		
Extensive public entity experience, provide Placement, Claims Administration, Loss Control and Risk Management Services, Brokered over 20 Years, Broker for Lee County School District	3 years with a 3% increase for 2nd year and 4% increase for 3rd year	We can provide quote either way.
Lee County School District St. Lucie County Charlotte County Schools Martin County St. Lucie County Schools		

57 **References**

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