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Meeting Date: February 26, 2014  
Staff Contact: Karen Cunningham, Program Risk Manager

**TITLE: C-14-5 - Recommendation of Award, P2014000050, Broker of Record**

**ACTION: Recommend Approval**

**SUMMARY:**

The Albuquerque Bernalillo County Water Utility Authority (Water Authority) issued the subject Request for Proposal (RFP) to solicit responses from qualified vendors to provide insurance broker of record services. The RFP was posted on the SICOMM website and advertised in the local newspapers. Four responses were received and submitted for evaluation. On February 6, 2014, the Ad Hoc Evaluation Committee reviewed, evaluated, and scored the responses in accordance with the evaluation criteria published in the RFP. The two respondents with the highest scores were chosen to make oral presentation to the Ad Hoc Evaluation Committee.

On February 20, 2014, presentations were made to the committee by the two finalists and the Ad Hoc Evaluation Committee reviewed, evaluated, and scored the presentations. Marsh & McLennan presented a much better approach than Aon as they came prepared with knowledge of Water Authority operations, demonstrated a thorough understanding of the insurance markets available to water operations and prepared an in-depth timetable for delivery of required services. In addition, the Marsh team included the director of the Marsh Public Sector team.

The Ad Hoc Evaluation Committee included Charles W. Kolberg, Water Authority General Counsel; Patty Jenkins, Executive Services Coordinator; Jack Burkhard, Independent Consultant; and Karen Cunningham, Risk Program Manager. Listed below are the scores of the four respondents.

<u><b>Offeror</b></u>	<u><b>Total Composite Score</b></u>	
	<u>February 6</u>	<u>February 20</u>
Marsh & McLennan	3210.0	3610.0
Aon Risk Services, Inc.	3356.0	3020.0
IMA	3154.0	
Poms & Associates	3076.5	

The committee recommended the award of a contract to **Marsh & McClennan**, as that company had the highest composite score after the oral presentation. Marsh & McClennan had the lowest cost proposal and provided the ad hoc committee with , is qualified to perform the work, and meets the requirements of the RFP.

**FISCAL IMPACT:**

The funding will be appropriated through the FY15 budget.



# Memo

**To:** Mark S. Sanchez, Executive Director

**From:** Karen Cunningham, Risk Manager

**Date:** 2/20/2014

**Re:** Recommendation of Award, P2014000050, Broker of Record

The Albuquerque Bernalillo County Water Utility Authority issued the referenced Request for Proposals (RFP) to solicit proposals from qualified vendors to provide Broker of Record services.

The RFP was posted on the Sicomm website and advertised in the local newspapers. Four (4) responses were received and submitted for evaluation. The ad hoc evaluation committee reviewed, evaluated, and scored the responses in accordance with the evaluation criteria published in the RFP, and selected the top two scoring companies, AON and Marsh to provide presentations and to answer questions.

I concur with the committee's recommendation for presentations and questions. Listed are all the respondents' composite scores with small and/or local preferences and the NM Resident Preference applied for the offeror with an asterisk. The largest total composite score possible without preferences applied is 4,000.

<u>Offeror</u>	<u>Total Composite Score</u>
AON plc	3356.0
IMA Financial Group.	3154.0
Marsh USA, Inc.	3210.0
Pom and Associates	3076.5*

After completing the presentations, and the question and answer sessions, the ad hoc evaluation committee rescored the responses of the top two respondents in accordance with the evaluation criteria published in the RFP. Listed below are the composite scores of AON and Marsh.

<u>Offeror</u>	<u>Total Composite Score</u>
AON	3020.0
Marsh	3610.0

The committee recommended the award of contract to Marsh as that company had the highest composite score and is qualified to perform the work. I concur with the committee's recommendation.

Water Authority Board approval is required for this procurement. Negotiations with the vendor shall begin immediately upon your approval.

Approved:

Recommended:

 2/21/14  
\_\_\_\_\_  
Mark S. Sanchez Date  
Executive Director

 2/20/14  
\_\_\_\_\_  
Charles Kolberg Date  
General Council

Attachments: Composite Score Sheet

Original: Thomas Courtin, Senior Buyer  
Copy: Lorraine Nunez, Purchasing Officer  
File: P2014000050

Broker of Record  
P2014000050  
FINAL EVALUATION

EVALUATOR	EVALUATION CRITERIA	EVALUATION FACTORS	OFFERORS	
			AON	Marsh
KC	The Offeror's general approach and plans to meet the requirements of the RFP.	Up to 100	75	90
CK			60	75
PJ			70	85
JB			90	100
SUB TOTAL			295	350
KC	The Offeror's detailed plans to meet the objectives of each task, activity, etc.	Up to 200	150	180
CK			120	150
PJ			150	190
JB			150	180
SUB TOTAL			570	700
KC	Adequacy of proposed project management and resources to be utilized by the Offeror.	Up to 100	75	90
CK			65	85
PJ			70	80
JB			75	95
SUB TOTAL			285	350
KC	Experience and qualifications of the Offeror and personnel to perform tasks described in Part 3, Scope of Services.	Up to 200	150	180
CK			150	180
PJ			160	185
JB			150	175
SUB TOTAL			610	720
KC	The Offeror's past performance on projects of similar scope and size.	Up to 100	75	90
CK			100	100
PJ			75	85
JB			80	90
SUB TOTAL			330	365
KC	The overall ability of the Offeror, as judged by the evaluation committee, to successfully complete the project within the proposed schedule; this judgment will be based upon factors such as the project management plan and availability of staff and resources.	Up to 200	150	180
CK			150	175
PJ			160	190
JB			150	180
SUB TOTAL			610	725
SUB TOTAL TECHNICAL SCORE			2700	3210
KC	Cost Proposal – The costs proposed by the Contractor as described in Section 2.2 of this RFP to perform the tasks listed in Part 3, Scope of Services. The evaluation of this section will occur after the technical evaluation, based on a	Up to 100	80	100
CK			80	100
PJ			80	100
JB			80	100
SUB TOTAL			320	400
SUB TOTAL COMPOSITE SCORE		Up to 4000	3020	3610
5% LOCAL BUSINESS PREFERENCE			0.0	0.0
5% NM RESIDENT PREFERENCE			0.0	0.0
5% ADDITIONAL SMALL BUSINESS PREFERENCE			0.0	0.0
TOTAL COMPOSITE SCORE			3020	3610

**Broker of Record  
P2014000050**

EVALUATOR	EVALUATION CRITERIA	EVALUATION FACTORS	OFFERORS			
			AON	IMA	MARSH	POMS
KC	The Offeror's general approach and plans to meet the requirements of the RFP.	Up to 100	90	50	50	75
CK			75	60	60	50
PJ			100	80	80	100
JB			90	75	100	85
SUB TOTAL			355	265	290	310
KC	The Offeror's detailed plans to meet the objectives of each task, activity, etc.	Up to 200	175	150	100	150
CK			170	135	175	125
PJ			190	180	195	160
JB			190	190	200	170
SUB TOTAL			725	655	670	605
KC	Adequacy of proposed project management and resources to be utilized by the Offeror.	Up to 100	90	75	90	50
CK			75	50	75	40
PJ			90	90	90	80
JB			85	85	95	75
SUB TOTAL			340	300	350	245
KC	Experience and qualifications of the Offeror and personnel to perform tasks described in Part 3, Scope of Services.	Up to 200	190	190	150	150
CK			150	110	125	100
PJ			180	185	180	150
JB			170	180	185	165
SUB TOTAL			690	665	640	565
KC	The Offeror's past performance on projects of similar scope and size.	Up to 100	90	75	75	75
CK			75	60	65	50
PJ			90	90	75	50
JB			85	95	95	75
SUB TOTAL			340	320	310	250
KC	The overall ability of the Offeror, as judged by the evaluation committee, to successfully complete the project within the proposed schedule; this judgment will be based upon factors such as the project management plan and availability of staff and resources.	Up to 200	190	175	150	175
CK			170	120	160	100
PJ			190	180	180	100
JB			180	170	180	180
SUB TOTAL			730	645	670	555
SUB TOTAL TECHNICAL SCORE			3180	2850	2930	2530
KC	Cost Proposal – The costs proposed by the Contractor as described in Section 2.2 of this RFP to perform the tasks listed in Part 3, Scope of Services. The evaluation of this section will occur after the technical evaluation, based on a cost/price analysis.	Up to 100	44	76	70	100
CK			44	76	70	100
PJ			44	76	70	100
JB			44	76	70	100
SUB TOTAL COST PROPOSAL			176	304	280	400
SUB TOTAL COMPOSIT SCORE		Up to 4000	3356	3154	3210	2930
5% LOCAL BUSINESS PREFERENCE			0.0	0.0	0.0	0.0
5% NM RESIDENT PREFERENCE			0.0	0.0	0.0	146.5
5% SMALL BUSINESS PREFERENCE			0.0	0.0	0.0	0.0
TOTAL COMPOSITE SCORE			3356.0	3154.0	3210.0	3076.5