
Meeting Date: January 30, 2019
Staff Contact: Karen Cunningham, Risk Program Manager

TITLE: C-19-2 - Approval of Contract with Aon Risk Services Southwest, Inc. for Insurance Broker Services

ACTION: Recommend Approval

SUMMARY:

Requesting approval to delegate signature authority to the Executive Director to enter into a contract with Aon Risk Services Southwest, Inc. (Aon) to provide insurance broker services.

If approved by the Board, an Agreement will be executed between the Water Authority and Aon to enable Aon to be our broker of record.

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. 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.

The committee recommended the award of a contract to **Aon**, as that company had the highest composite score.

FISCAL IMPACT:

The fiscal impact is expected to be \$278,207 (including all taxes) for the total broker fee and \$1,800,000 yearly for all insurance premiums paid by the broker.

Memo

To: Mark S. Sanchez, Executive Director

From: Candida Kelcourse, Purchasing Administrator *CK*

Through: Jonathan Daniels, Chief Purchasing Officer *JD*

Date: January 15, 2019

Re: Recommendation of Award, P2019000003, Insurance Broker of Record RFP

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

The RFP was posted on SicommNet and advertised in the local newspaper. Five (5) 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. From the initial offers, two (2) finalists were identified and were requested to provide best and final offers. Two rounds of scoring were held, and subsequent tabulations are attached.

Listed are the finalist's total composite scores. Scores for all other offerors can be seen on the attached preliminary score tabulation. The largest total composite score possible without preferences applied is 100. Neither finalist applied for the small or local preferences nor the NM Resident Preference. All scores listed are the combined average of all Committee members.

<u>Offeror</u>	<u>Total Composite Score</u>
Aon Risk Services Southwest, Inc.	91
Marsh USA, Inc.	85

The Committee recommended the award of contract to **Aon Risk Services Southwest, Inc.** as the company had the highest composite score after final scoring and is qualified to perform the work. I concur with the Committee's recommendation.

Approved:

Recommended:



Mark S. Sanchez
Executive Director

1/17/19

Date



Karen Cunningham
Risk Manager

1/17/19

Date

Enclosures: Composite Score Sheets

Insurance Broker of Record
Request for Proposals No. P2019000003
Preliminary Tabulation

EVALUATION CRITERIA	EVALUATION FACTORS	OFFERORS				
		HUB International	Alliant	Aon	MARSH	USI
1. Experience and qualifications of the Offeror and personnel.	Up to 40	25	30	37	35	22
2. The Offeror's general approach and plans to meet the requirements of the RFP.	Up to 40	25	24	35	30	23
3. Cost Proposal – The costs proposed by the Offeror to perform the tasks listed in the Scope of Services.	Up to 20	14	16	15	16	20
TOTAL COMPOSITE SCORES		64	70	87	81	65
Resident Business Preference	Up to 5%	5				
Resident Veteran Business Preference	Up to 10%					
Recycled Content Goods Preference	Up to 5%					
Local Business Preference	Up to 5 %	5				
Small Business Preference	Up to 5%					
Pay Equity Preference (NOT CURRENTLY AVAILABLE)	Up to 5%					
15% Preference Max		10	0	0	0	0
TOTAL COMPOSITE SCORES WITH PREFERENCES		74	70	87	81	65
RANKING		3	4	1	2	5
		HUB International	Alliant	Aon	MARSH	USI

Insurance Broker of Record
Request for Proposals No. P2019000003
Final Tabulation

EVALUATION CRITERIA	EVALUATION FACTORS	OFFERORS	
		Aon	MARSH
1. Experience and qualifications of the Offeror and personnel.	Up to 40	37	35
2. The Offeror's general approach and plans to meet the requirements of the RFP.	Up to 40	35	30
3. Cost Proposal – The costs proposed by the Offeror to perform the tasks listed in the Scope of Services.	Up to 20	19	20
TOTAL COMPOSITE SCORES		91	85
Resident Business Preference	Up to 5%		
Resident Veteran Business Preference	Up to 10%		
Recycled Content Goods Preference	Up to 5%		
Local Business Preference	Up to 5 %		
Small Business Preference	Up to 5%		
Pay Equity Preference (NOT CURRENTLY AVAILABLE)	Up to 5%		
15% Preference Max		0	0
TOTAL COMPOSITE SCORES WITH PREFERENCES		91	85
RANKING		1	2
		Aon	MARSH