

RFQ for Insurance Broker and Risk Mgmt. Consulting Services

Pre-Qualification Conference Friday March 25, 2016

San Francisco City Hall Room 421 9:30 AM PST

List of Attendees:

Matt Hansen, City and County of SF, General Services Agency, Risk Mgmt. Division
Peter Goldstein, City and County of SF, General Services Agency, Risk Mgmt. Division
Seth Benkle, City and County of SF, General Services Agency, Contract Mgmt. Division
Jon Folmsbee, EXIGIS
Cindy Wilkerson, Keenan Associates
Al Fine, G2
Sarah Velasquez, AECOMM
P.J. Skarlanic, Alliant
Matthew H. Davis, Aon
Tapio Boles and Patrick Yu, Willis Towers Watson
Martin Molloy, TSIB

The following is a summary of the information presented at the meeting:

Mr. Goldstein presented a brief summary of the schedule for the RFQ to establish the pool and emphasized the importance of meeting deadlines presented in the RFQ document.

Mr. Benkle presented an overview of the LBE portion of the RFQ process. He explained that the minimum subcontracting goal of 11% in the RFQ document related to the dollar value that firms would receive from the City and did not relate to the total dollar volume of activity in a future contract, more specifically it did not relate to the amount of money that would be spent directly on insurance premiums.

Mr. Benkle also explained that a variety of methods could be used to demonstrate good faith effort in attempting to meet the 11% LBE subcontracting goal, and that these methods would need to be documented to show that “the 80 point threshold” for such efforts was met. Details on this topic are described on page 27 of a document posted on the City’s Contract Monitoring Division’s (CMD) web site:

http://sfgov.org/cmd/sites/default/files/FileCenter/Documents/13050-CH14B_Rules_07012015_Final_clean.pdf

The CMD web site also includes links to all forms required for this RFQ, these forms include Forms 2A, 2B, 3, 5, and for joint ventures Form 4 as well.

<http://sfgov.org/cmd/important-forms>

Mr. Benkle emphasized that Form 2A must show work subcontracted to LBE’s as a defined percentage not as a range.

Mr. Benkle also explained that firms could avoid documenting good faith efforts if they exceeded the 11% LBE subcontracting goal by 35%. In other words if a firm's response to the RFQ showed that it would subcontract 14.85% ($11 \times 1.35 = 14.85$), of the dollar value the firm receives to LBE's, they would not need to document their good faith efforts.

Mr. Benkle also explained that if a proposal was offered by a joint venture that included an LBE, the joint venture would still need to meet the 11% subcontracting goal.

Mr. Benkle explained that proposers should show the team they plan to work with, and that if they needed to switch subcontractors at a later date that such a switch would require CMD approval.

Mr. Hansen explained that firms could propose directly as their own entity to become a member of the pool, and they could also be proposed as a subcontractor in another firm's proposal.

Mr. Hansen also explained that underwriters and wholesale brokers are not counted as subcontractors for this RFQ.

Mr. Hansen encouraged firms to apply for those areas of services that they excel at, and stated that firms do not need to apply for areas that they do not excel at. He also stated that firms experience does not need to be in San Francisco to demonstrate competency.