

**INDIAN RIVER COUNTY
OFFICE OF MANAGEMENT AND BUDGET
PURCHASING DIVISION**

DATE: October 23, 2023

TO: BOARD OF COUNTY COMMISSIONERS

THROUGH: John A. Titkanich, Jr., County Administrator
Kristin Daniels, Director, Office of Management and Budget
Jennifer Hyde, Purchasing Manager

FROM: Shelby Ball, Purchasing Specialist

SUBJECT: Award of RFP 2024008 for Agent/Brokers, Self-Insurance Fund and Direct Writing Insurers for Property and Casualty Insurance

BACKGROUND:

On behalf of the Risk Management Division, a Request for Proposals (“RFP”) was issued to gather proposals from agent/brokers, self-insured trust funds or direct writing insurers to obtain commercial property, excess general liability, automobile liability as well as other policies, as the final term of the agreement with our current provider, Arthur J. Gallagher Risk Management Services (Gallagher) ends December 31, 2023. The term of award is one year, with four, one-year renewals available.

DISCUSSION:

A selection committee comprised of Cynthia Stanton, Risk Manager, Judy Ley, Risk Management Specialist, Kristin Daniels, Director, Office of Management and Budget, Suzanne Boyll, Human Resources Director and Susan Prado, Deputy County Attorney independently reviewed and scored the received proposals. The committee then met to compile an initial ranking of firms. After discussions, the committee determined no interviews were necessary, and declared the ranking final.

Firm	Total Fees per Year	Total of Fees for entire life of contract (5 Years)
1. Arthur J. Gallagher Risk Management Services, LLC	\$125,000	\$625,000
2. Lockton Companies, LLC	\$160,000	\$800,000
3. USI Insurance Services, LLC	\$150,000	\$750,000

Gallagher was previously selected to provide these services under an agreement approved on April 21, 2020, at a flat annual fee of \$175,000.

FUNDING:

Funding for insurance broker services, in the amount of \$125,000 per year, is budgeted and available in the Self-Insurance Fund/Risk Management/Other Insurance account, number 50224613-034590.

Account Number	Account Description	Fees for FY 24/25
50224613-034590	Self-Insurance Fund/Risk Management/Other Insurance	\$125,000

RECOMMENDATION:

Staff recommends the Board approve the final ranking of firms, award the RFP to Arthur J. Gallagher Risk Management Services, LLC, approve the agreement, and authorize the Chairman to execute it, after review and approval by the County Attorney as to form and legal sufficiency. Staff also recommends the Board authorize the Purchasing Manager to renew this agreement, under the same terms and conditions for four additional one-year periods subject to satisfactory performance, vendor acceptance, and determination by the Risk Management Division that renewal of this agreement is in the best interest of Indian River County.

ATTACHMENT

Agreement