

COUNTY OF ROCKLAND
Department of General Services
Purchasing Division

Contract Award Notification

Title: **Insurance Broker of Record, QSL**

Contract Period: September 30, 2021 thru September 29, 2024 w/2-1 year options
Extended through September 29, 2025, w/ 1-year option

Original Date of Issue: November 2, 2021

Date of Revision: 07/29/2024

RFP No: **RFP-RC-2021-001**

Ordering method: **Special Request**

Authorized Users: County Departments

Address Inquiries To:

Name: Claudia Moodie
Title: Purchaser II
Phone: 845-364-3821
Fax: 845-364-3809
E-mail: MoodieC@co.rockland.ny.us

Description

This is a qualified suppliers list for insurance brokers.

Contract #	Vendor Number	Contractor & Address	Telephone No.
RFP-RC-2021-001	0000010968	Arthur J. Gallagher Risk Management 2 Wester Park Dr, Suite 300 White Plains, NY 10604 Contact: Sulim Bartok sulim_bartok@ajg.com	860-463-9900 FAX: 914-323-4512
RFP-RC-2021-001	0000024254	Acrisure LLC DBA CLG Insurance 1200 MacArthur Blvd Suite 105 Mahwah, NJ 07430 Contact: Kathleen Bradley kbradley@clginsurance.com	845-623-3434 FAX: 845-623-4332
RFP-RC-2021-001	0000027075	Frank H. Reis Inc DBA the Reis Group 475 Washington Ave Kingston, NY 12401 Contact: Owen McKane III omckane@reisinsurance.com	845-943-6630 FAX: 845-338-4113

Contract #	Vendor Number	Contractor & Address	Telephone No.
RFP-RC-2021-001	0000027076	Haylor, Freyer & Coon Inc. 300 South State St. Suite 1000 Syracuse, NY 13202 Contact: Hank Chapman hchapman@haylor.com	315-703-1398 FAX: 315-362-5747
RFP-RC-2021-001	0000015990	Sterling Risk 135 Crossways Park Drive Woodbury, NY 11797 Contact: Michael Fleischer mfleischer@sterlingrisk.com	516-719-8759 FAX: 516-719-8806
RFP-RC-2021-001	0000027300	Brown & Brown of New York Inc. 625 Route 6 Mahopac, NY 10541 Contact: Kieran Boyle Kieran.boyle@bbrown.com	845-743-7015 Fax: 845-628-1804

Edwin J. Day, County Executive

**INSURANCE BROKER (S) OF RECORD
QUALIFIED SUPPLIERS LIST (QSL)**

RFP-RC-2021-001

COST PROPOSAL

Sole compensation for services rendered under the award will be commissions paid to the successful Broker from insurance carriers with whom the successful Broker secures the County of Rockland's insurance coverage and share that information with the County.

Clearly set forth in detail any and all additional expenses for which you expect to be reimbursed. The proposal must, however, provide a guarantee that no additional fees will be charged to the County of Rockland without prior written consent by the County.

Fee Description	Proposed Fee
Sole compensation for services rendered under the award will be commissions paid to the successful Broker from insurance carriers with whom the successful Broker secures the County of Rockland's insurance coverage.	Commission paid by Insurance Companies
Any and all additional expenses for which Broker expects to be reimbursed; including any alternative matters or items proposed. <i>(Please provide detailed description and proposed fees).</i>	Create a separate expense sheet if applicable and submit with Cost Proposal <i>none</i>

Name of Firm: Acrisure LLC D/B/A CLG Insurance

Print Name: Kathleen Bradley
Name of person responsible for this solicitation

By signing this solicitation, I acknowledge that I have read and accept The Standard Terms and Conditions for Professional Service Contracts included in this RFP:

Signature: 

Email Address: kbradley@CLG Insurance.com

Direct Phone Number: 845-623-3434

I acknowledge the receipt of all addendums

Date: 7/8/21

Cost Proposals are to be uploaded as a separate attachment to your RFP response. Please refer to the instructions titled: Proposal Submittal Procedures for instructions on submitting your proposal electronically. Inclusion of any cost or pricing data within the technical proposal may result in your proposal being judged as non-responsive.

Edwin J. Day, County Executive

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Name of Firm: The Reis Group

Print Name: Owen McKane
Name of person responsible for this solicitation

By signing this solicitation, I acknowledge that I have read and accept The Standard Terms and Conditions for Professional Service Contracts included in this RFP:

Signature: 

Email Address: omckane@reisinsurance.com

Direct Phone Number: (845) 943-6630

I acknowledge the receipt of 3 addendums

Date: July 8, 2021

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Edwin J. Day, County Executive**INSURANCE BROKER (S) OF RECORD
QUALIFIED SUPPLIERS LIST (QSL)****RFP-RC-2021-001****COST PROPOSAL**

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Fee Description	Proposed Fee
Sole compensation for services rendered under the award will be commissions paid to the successful Broker from insurance carriers with whom the successful Broker secures the County of Rockland's insurance coverage.	Commission paid by Insurance Companies We/Gallagher will cap our commissions at 10%.
Any and all additional expenses for which Broker expects to be reimbursed; including any alternative matters or items proposed. <i>(Please provide detailed description and proposed fees).</i>	Create a separate expense sheet if applicable and submit with Cost Proposal Not Applicable; All compensation is paid via commission by insurance companies.

Name of Firm: Arthur J. Gallagher Risk Management Services, Inc.Print Name: Ed Lehan, Area President

Name of person responsible for this solicitation

By signing this solicitation, I acknowledge that I have read and accept The Standard Terms and Conditions for Professional Service Contracts included in this RFP:

Signature: Email Address: Ed_Lehan@ajg.comDirect Phone Number: (860)463-9900I acknowledge the receipt of 3 addendumsDate: June 30, 2021

Cost Proposals are to be uploaded as a separate attachment to your RFP response. Please refer to the instructions titled: Proposal Submittal Procedures for instructions on submitting your proposal electronically. Inclusion of any cost or pricing data within the technical proposal may result in your proposal being judged as non- responsive.

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Name of Firm:

HAYLOR, FREYER + COON

Print Name:

HANK CHAPMAN

Name of person responsible for this solicitation

By signing this solicitation, I acknowledge that I have read and accept The Standard Terms and Conditions for Professional Service Contracts included in this RFP:

Signature:

[Signature]

Email Address:

HCHAPMAN@HAYLOR.COM

Direct Phone Number:

315-703-1398

I acknowledge the receipt of

3

addendums

Date:

JULY 8, 2021

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Name of Firm: STERLING RISK

Print Name: MICHAEL FLEISCHER
Name of person responsible for this solicitation

By signing this solicitation, I acknowledge that I have read and accept The Standard Terms and Conditions for Professional Service Contracts included in this RFP.

Signature: [Signature]

Email Address: mfleischer@sterlingrisk.com

Direct Phone Number: 516-719-8759

I acknowledge the receipt of 1 addendums

Date: 7/8/2021

Cost Proposals are to be uploaded as a separate attachment to your RFP response. Please refer to the instructions titled: Proposal Submittal Procedures for instructions on submitting your proposal electronically. Inclusion of any cost or pricing data within the technical proposal may result in your proposal being judged as non-responsive.

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**INSURANCE BROKER (S) OF RECORD
QUALIFIED SUPPLIERS LIST (QSL)****RFP-RC-2021-001****COST PROPOSAL**

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Name of Firm: Brown + Brown of New York Inc.Print Name: Kieran Boyle
Name of person responsible for this solicitation

By signing this solicitation, I acknowledge that I have read and accept The Standard Terms and Conditions for Professional Service Contracts included in this RFP:

Signature: Kieran BoyleEmail Address: Kieran.boyle@bbrown.comDirect Phone Number: 845-743-7015I acknowledge the receipt of three addendumsDate: 3-1-22

Cost Proposals are to be uploaded as a separate attachment to your RFP response. Please refer to the instructions titled: Proposal Submittal Procedures for instructions on submitting your proposal electronically. Inclusion of any cost or pricing data within the technical proposal may result in your proposal being judged as non-responsive.

Edwin J. Day, County Executive**INSURANCE BROKER (S) OF RECORD
QUALIFIED SUPPLIERS LIST (QSL)****RFP-RC-2021-001**

The County of Rockland is subject to New York State's Freedom of Information law (FOIL). Should your submission, to this RFP, contain "trade secrets", or other information that the disclosure of which could reasonably be expected to be harmful to business interests, you must insure that such information is clearly identified and marked as such. Identification must be specific by item or paragraph.

Marked information will be treated as Confidential Third Party Information. Should marked information be the subject of a request under FOIL, you may be requested either to consent to the request, or make representation explaining why the information should not be disclosed.

Unpublished information pertaining to the County or its customers obtained by the proposer as a result of participation in this project is confidential and must not be disclosed without written authorization from the County.

DETAILED SCOPE OF WORK

The successful Proposer(s) must provide, at a minimum, the following insurance brokerage services and possess and keep in force all licenses and permits required to perform the services listed herein:

1. When instructed to do so by the County, prepare appropriate applications, administer the placement of coverage and provide original binders, policies and endorsements as required in the timetable specified by the County. Advise and place the County's insurance, including but not limited to general liability, property, boiler & machinery, inland marine, police officer liability, cyber liability, excess workers compensation, public officials liability, auto liability and excess coverage.
2. Based on the insurance coverage selected by the County, organize, develop and present to markets the County insurance coverage requirements and obtain bids from responsible insurers for that coverage. Evaluate those bids and present to the County the package of insurance policy terms, conditions and premiums that best reflects the goals and objectives of the County.
3. Analyze proposals received from various insurance companies and other parties, negotiate changes for the benefit of the County and verify the reasonableness of the price for the coverage provided.
4. Provide the County with a summary of various insurance program options, including but not limited to: limits, coverage(s), retention levels, terms, conditions, premiums, payment options and self-insurance.
5. Make recommendations to the County as to the most advantageous insurance program providing the highest level of coverage at the best possible price to meet the County's needs and objectives.
6. Provide analysis and recommendations as to the most cost effective means for addressing the County's exposures.
7. When directed to do so, represent the County in all negotiations with insurers, underwriters and other parties with regard to the insurance program.
8. Provide extensive review of binders and policies including verification of conformity to specifications. Request any necessary endorsements/changes/revisions that may be required.

Edwin J. Day, County Executive**INSURANCE BROKER (S) OF RECORD
QUALIFIED SUPPLIERS LIST (QSL)****RFP-RC-2021-001**

9. Monitor and update coverages, place additional coverages and terminate existing coverages as required by the County of Rockland.
10. Issue certificates of insurance as required by the County of Rockland within a maximum of two (2) business days of request.
11. Consult with the County of Rockland regarding the effectiveness of the program, review proposed changes and new coverages in anticipation of the next year's insurance program, including but not limited, to the evaluation of alternative insurance and/or risk financial proposals.
12. Annually analyze similarly situated municipal government requirements for vendors and advise the County of Rockland on questions of insurance both as to coverage for the County itself and as to insurance to be obtained from various contractors and agencies doing business with/for the County of Rockland.
13. Advise the County of Rockland whenever new coverages become available and consult with the County of Rockland and/or designated representative for the County regarding the advisability of obtaining such coverages.
14. Meet with the County of Rockland and discuss the coverage obtained by Broker.
15. Annually analyze where savings could be obtained within the County of Rockland's coverage.
16. Establish and maintain, with the cooperation of County personnel, an up-to- date listing of all real and personal property owned and/or leased by the County of Rockland and intended to be covered under any policies of insurance.
17. Analyze and recommend efficient procedures for administration of insurance and/or risk management programs by the County of Rockland and provide insurance requirements and risk management training to the County of Rockland upon request.
18. Assure that insurance policies are placed with reputable and financially responsible insurers (based on insurance rating among other criteria), including, keeping the County informed of any changes in rating of the insurers and making recommendations should ratings change during the policy term.
19. Perform administrative and clerical services relative to account management, including but not limited to, issuance of certificates of insurance, and verification of the accuracy of bills, request and review endorsements for accuracy, audits and all premium adjustments or payments.
20. Assign an Account Manager to the County who will be responsible for communication with the County and who, along with any other team members assigned, must be available on a daily basis to the County for advice and consultation on insurance program related issues and concerns.
21. Attend meetings related to the insurance program with County staff and other parties, as requested.
22. Review any related insurance company audits for accuracy.

Edwin J. Day, County Executive**INSURANCE BROKER (S) OF RECORD
QUALIFIED SUPPLIERS LIST (QSL)****RFP-RC-2021-001**

23. Act as a liaison between the County and the carriers to resolve coverage issues and claims.
24. Advise the County, when requested, on coverage application to specific claims.
25. Review loss runs provided by the County upon request, and advise the County of any anticipated problems relating to insurance coverage or exclusions.
26. Provide such other services related to the insurance coverage as the County may reasonably request. Please be specific about how these services will benefit the County.

PROPOSAL REQUIREMENTS AND COMPANY QUALIFICATIONS

Each Proposer shall provide a statement of qualifications including:

1. A brief history and description of the firm submitting the proposal.
2. Identification of the firm's professional staff members who will be assigned to this engagement if the firm's proposal is selected. Include a resume for each such professional staff member that details qualifications, years and types of experience, education, accomplishments, and proficiency in providing insurance brokerage services. Specify the extent of the availability and commitment of each such professional staff member who will be assigned to this engagement if the firm's proposal is selected. If the firm will be subcontracting any work, describe the tasks to be subcontracted in this section and provide the proposed subcontractor's qualifications.
3. A signed cover letter from a person within the firm who is authorized to make representations on behalf of the firm and to bind the firm.
4. A detailed summary of your firm's experience in providing insurance brokerage services to municipalities. Proposer shall assign and designate a specific individual from the firm to the County's account. Proposer must have and maintain an office in the State of New York within the NY Metropolitan/lower Hudson Valley service area, and must be licensed and authorized to do business in the State of New York.
5. Identify claims legal staff, or define accessibility to claims legal resources within your firm or through outside counsel.
6. Any additional information which would serve to distinguish the firm from other firms submitting proposals.
7. Provide at least two (2) references from similar projects, including the name, address and phone number of these references.

The County of Rockland may make such inquiries it deems necessary to determine the ability of each Proposer to perform the services contemplated by this RFP. Proposers shall promptly furnish all information and data for this purpose as may be subsequently requested by the County of Rockland.

DEPARTMENT OF GENERAL SERVICES, PURCHASING DIVISION

Dr. Robert L. Yeager Health Center
50 Sanatorium Rd, Building A
Pomona, New York 10970
Phone: (845) 364-3820 Fax: (845) 364-3809
Email: purchasing@co.rockland.ny.us

Paul Brennan, FNIGP, NIGP-CPP, CPPO
Director of Purchasing

ADDENDUM # 1

RFP-RC-2021-001

Insurance Broker of Record Qualified Suppliers List (QSL)

The information in this addendum supersedes any contradictory information set forth in the contract documents. Acknowledge receipt of this addendum, in the space provided on the acknowledge section of the cost proposal page and submit this signed addendum with your proposal. Failure to do so, may subject the vendor to disqualification. This addendum forms a part of the contract documents.

Please see the following vendor's question(s), clarification(s) and the County of Rockland's response regarding the above referenced project:

Question 1:

Who is the County's current TPA?

Response 1:

Essential Services and Programs for liability and PMA for workers compensation.

Question 2:

How many Brokers/Agents are placing the coverages?

Response 2:

Three Currently one broker is doing the excess workers compensation, one is doing the property and a third is doing all the remaining coverages.

Question 3:

Are the current brokers/Agents being compensated Net of commissions or Commissions?

Response 3:

Commission.

Question 4:

Are you aware of any changes with your current carriers in limits/coverages etc.?

Response 4:

No.

Question 5:

Are we able to get a summary of your losses, total claims, claims per year etc.?

ADDENDUM # 1(continued)

Response 5:

The County will not provide actual loss runs. We average about 125 liability claims and 125 workers compensation claims per year. On the liability side, no more than 5 need to be reported to the carrier. On the workers compensation side, the TPA handles reporting claims to the excess carriers. We currently have about 100 open workers compensation claims and 100 open liability claims.

Question 6:

Do you have a safety committee? If so how often do they meet?

Response 6:

No.

Question 7:

Do you have a safety committee? If so how often do they meet?

Response 7:

Annually on liability and twice a year on workers compensation.

Question 8:

What type of services are being provided by your current Broker/Agent's?

Response 8:

Place insurance coverage, advise on market conditions, review of contract wording with some vendors.

SIGNED:

Paul J. Brennan

**PAUL J. BRENNAN, FNIGP, NIGP-CPP, CPPO
DIRECTOR OF PURCHASING**

ADDENDUM
6/21/21

DEPARTMENT OF GENERAL SERVICES, PURCHASING DIVISION

Dr. Robert L. Yeager Health Center
50 Sanatorium Rd, Building A
Pomona, New York 10970
Phone: (845) 364-3820 Fax: (845) 364-3809
Email: purchasing@co.rockland.ny.us

Paul Brennan, FNIGP, NIGP-CPP, CPPO
Director of Purchasing

ADDENDUM # 2

RFP-RC-2021-001

Insurance Broker of Record Qualified Suppliers List (QSL)

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Please see the following vendor's question(s), clarification(s) and the County of Rockland's response regarding the above referenced project:

Question 1:

Will loss runs/loss history be made available?

Response 1:

See Addendum # 1.

Question 2:

How did the County determine the structure of its current insurance program with regard to limits being purchased, levels of self-insured retention/deductibles, etc.?

Response 2:

With the advice of our brokers, we weigh the cost benefit of each layer of coverage, deductibles and SIR's. We also take into account the potential risk for different county operations.

Question 3:

What types of claims and loss control services do your current brokers offer?

Response 3:

Currently our brokers provide market analysis, they do not provide much in the way of loss control services, although they do look at contracts and advise on wording for certain contracts.

Question 4:

Are you satisfied with the level of service you are receiving from your current brokers? If not, why?

Response 4:

Yes we are currently satisfied with our brokers.

Question 5:

What areas of your risk management program could use more support (if any)?

ADDENDUM # 2 (continued)

Response 5:

We have good loss control services from our carriers and our TPA's.

Question 6:

When was the last time the County issued a RFP for Insurance Brokerage Services?

Response 6:

5 Years ago.

Question 7:

Will the winning broker be awarded the entire insurance program, and therefore, replace all three of the County's current brokers as the County's sole broker?

Response 7:

See RFP "QUALIFIED SUPPLIERS LIST" Page 2.

Question 8:

Approximately how many certificates of insurance does the County require be issued on annual basis?

Response 8:

We require less than 10 certificates from our insurance carries per year.

SIGNED:

Paul J. Brennan

**PAUL J. BRENNAN, FNIGP, NIGP-CPP, CPPO
DIRECTOR OF PURCHASING**

ADDENDUM
6/21/21

DEPARTMENT OF GENERAL SERVICES, PURCHASING DIVISION

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Phone: (845) 364-3820 Fax: (845) 364-3809
Email: purchasing@co.rockland.ny.us

Paul Brennan, FNIGP, NIGP-CPP, CPPO
Director of Purchasing

ADDENDUM # 3

RFP-RC-2021-001

Insurance Broker of Record Qualified Suppliers List (QSL)

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Please see the following vendor's question(s), clarification(s) and the County of Rockland's response regarding the above referenced project:

Question 1:

- Will the winning broker of this RFP take over as the broker for part or all of the County's insurance program OR will the winning broker simply be added to the County's QSL, therefore becoming eligible to act as the County's broker at some point in the future?

Response 1:

- Broker's meeting the requirement of the RFP and based on the overall evaluation scores will be added to a Qualified Supplier's list and will be eligible to act as the County's broker at some point in the future.

Question 2:

- If the winning broker of this RFP is simply added to the County's QSL, how and when is it determined if that broker will actually provide brokerage services for the County?

Response 2:

- The County will contract with Broker (s) based on their expertise and services available as well as their access to and relationships with markets that best meets the County's needs.
 - The County may contract with a single broker or multiple brokers based on the current need.

SIGNED:

Paul J. Brennan

PAUL J. BRENNAN, FNIGP, NIGP-CPP, CPPO
DIRECTOR OF PURCHASING