

**CITY OF EL PASO, TEXAS  
AGENDA ITEM  
DEPARTMENT HEAD'S SUMMARY FORM**

**DEPARTMENT:** Human Resources, Benefit Services

**AGENDA DATE:** August 09, 2016

**CONTACT PERSON NAME AND PHONE NUMBER:** Bruce D. Collins, Purchasing Director 212-1181  
Linda Ball Thomas, HR Director 212-1240

**DISTRICT(S) AFFECTED:** All

**STRATEGIC GOAL:**

Goal 6: Set the Standard for Sound Governance and Fiscal Management

**SUBJECT:**

Discussion and action on the award of Solicitation 2016-1011R, to USI Southwest Inc. through Illinois National /AIG Insurance Company for an initial one year contract through August 31, 2017 with two additional options to negotiate one year renewals.

Annual Estimated Award:	\$500,001.00
Total Estimated Award:	\$500,001.00

**BACKGROUND / DISCUSSION:**

This Solicitation was released on June 7, 2016 and received four options through two different vendors. TML submitted one proposal. USI Southwest Inc. submitted proposals through Illinois National/AIG Insurance Company, Stratford/Western Work Insurance Company, and Ace American. The current vendor is Illinois National/AIG Insurance Company. The evaluation committee included one representative from City Attorney's Office and two from Human Resources. The ratings were compiled and recommended USI Southwest Inc. through Illinois National / AIG Insurance Company. Evaluation factors reviewed included Coverage Type, Proposal Cost, Experience & Qualifications, Quality of Response, and Response of References.

**SELECTION SUMMARY:**

Solicitation was advertised on June 7, 2016 and June 14, 2016. The solicitation was posted on City website on June 7, 2016. The email (Purmail) notification was sent out on June 9, 2016. Total of eleven (11) vendors were solicited; one (1) local vendor. Two (2) proposals were received; one (1) local vendors (this local vendor submitted three (3) options within their proposal).

**PRIOR COUNCIL ACTION:**

The previous initial solicitation was awarded on January 26, 2010 for one year with two (2) one (1) year renewal options. Policy did not begin until September of that year. Timing for this solicitation will now align with policy start dates.

**PROTEST**

☒ There was no protest received for this requirement.

☐ Protest received.

**AMOUNT AND SOURCE OF FUNDING:**

Funding source:

544020 562	3000	62030	
544020 334	3100	34060	P3401
544020 341	1000	41160	P4101
544020 560	3200	60000	P6003
544020 999	1000	99999	

**BOARD / COMMISSION ACTION:** N/A

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\*\*\*\*\*REQUIRED AUTHORIZATION\*\*\*\*\*

**DEPARTMENT HEAD:**

  
Linda Ball Thomas, Human Resources Director

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**COUNCIL PROJECT FORM  
(RFP)**

\*\*\*\*\***POSTING LANGUAGE BELOW**\*\*\*\*\*

Please place the following item on the **REGULAR** agenda (under **RFP's**) for the Council Meeting of **AUGUST 9, 2016**.

**STRATEGIC GOAL: NO.6: Set the Standard for Sound Governance and Fiscal Management**

Discussion and action on the award of Solicitation No. 2016-1011R Public Officials and Employment Practices Liability Insurance for an initial one (1) year term estimated award of \$500,001.00. Performance period is from September 1, 2016 to August 31, 2017.

Department:	Human Resources
Award to:	USI Southwest, Inc. (Option1 Illinois National / AIG Insurance Company) El Paso, TX 79907
Item(s):	All
Initial Term:	1 year
Annual Estimated Amount:	\$500,001.00
Total Estimated Award:	\$500,001.00 (1 year)
Account No.:	562 – 62030 – 3000 - 544020 334 – 34060 – 3100 – 544020 – P3401 341 – 41160 – 1000 – 544020 – P4101 560 – 60000 – 3200 – 544020 – P6003 999 – 99999 – 1000 – 544020
Funding Source:	Airport Operation, Environmental Services, General Funds, Sun Metro General Operations, General Funds – General Liability Insurance
District(s):	All

This is a Request for Proposal, service contract.

The Purchasing & Strategic Sourcing Department and Human Resources recommend award as indicated to USI Southwest, Inc., the highest ranked proposer based on evaluation factors established for this procurement. In accordance with this award the City Manager or designee is authorized to exercise future options if needed.

\*\*\*\*\***ADDITIONAL INFO BELOW**\*\*\*\*\*

**Committee Score Sheet**  
**2016-1011R Public Officials and Employment Practices Liability Insurance**  
**Request for Proposal**

Evaluation Factors	Maximum Amount of Points	Texas Munipal League Intergovernmental Risk Pool Austin, TX	USI Southwest, Inc. (Option 1: Illinois National /AIG Insurance Company) El Paso, TX	USI Southwest, Inc. (Option 2: Stratford/Western World ) El Paso, TX	USI Southwest, Inc. (Option 3 Ace American Insurance Company) El Paso, TX
<b>A) Coverage Type</b> Limits, terms, conditions and exclusions of the coverage provided, cost and services available from the broker, insurer(s) and pool(s)	25	19.33	24.67	23.33	24.00
<b>B) Proposal Cost</b> Provide detail information on cost submitted and performance guarantees offered	25	\$338,141.00 25.00	\$500,001.00 16.91	\$399,189.00 21.18	\$413,419.00 20.45
<b>C) Experience and Qualifications</b> Provide a full description of the experience you have in providing the requested service. Provide a resume detailing your past history and background. Identify projects of similar size and scope. Offer should have experience in the following areas:  a. Qualifications in performing specific job requirements stated (12.5 points)  b. Experience in writing Public Officials & Employment Liability Insurance for similar size political subdivision as well as private sector providers (12.5 points)	25	21.50	25.00	22.33	22.67
<b>D) Quality of Response and Presentation</b> a. Readability, completeness, understanding of project scope (10 points)  b. Adherence to response format requirements (10 points)	20	8.67	19.67	18.33	18.67
<b>E) Response of References</b> a. Complete projects on-time, within budget (2.5 points)  b. Communicates and interacts with all staff levels and produces high quality results (2.5 points)	5	3.33	3.33	3.33	3.33
<b>Totals</b>	<b>100 Points</b>	<b>77.83</b>	<b>89.57</b>	<b>88.51</b>	<b>89.11</b>

ATTN: JIM BRUNDAGE  
USI SOUTHWEST  
2505 E. MISSOURI AVE.  
EL PASO, TX 79903

EMPLOYERS GENERAL INSURANCE GROUP  
1700 PACIFIC AVENUE SUITE 2500  
DALLAS, TX 75201

THE HORTON GROUP  
10320 ORLAND PARKWAY  
ORLAND PARK, IL 60467

TEXAS MUNICIPAL LEAGUE  
1821 RUTHERFORD LANE  
AUSTIN, TX 78754

TEXAS POLITICAL SUBDIVISIONS  
14990 LANDMARK BLVD. STE 300  
DALLAS, TX 75254

U. S. RISK  
8401 N. CENTRAL EXPRESSWAY SUITE 1000  
DALLAS, TX 75225

ARTHUR J. GALLAGHER & CO.  
THE GALLAGHER CENTRE  
TWO PIERCE PLACE  
ITASCA, IL 60143-3141

ARTEX RISK SOLUTIONS, INC.  
TWO PIERCE PLACE  
ITASCA, IL 60143-3141

ROACH, HOWARD SMITH & BARTON  
8750 N. CENTRAL EXPRESSWAY SUITE 500  
DALLAS, TX 75231US

ZOE HOLMES  
MARSH USA INC.  
4400 BANK ONE CENTER  
1717 MAIN STREET  
DALLAS, TX 75201-7357

BBVA COMPASS  
ATTN: JIM VOLK  
690 SUNLAND PARK DRIVE  
EL PASO, TX 79912

ATTN: MELANIE STINSON  
STINSON & SON NATIONA WIDE INSURANCE  
9900 MONTANA AVENUE  
EL PASO, TX 79925  
(UNABLE TO FORWARD)

NOW HUB INTERNATIONAL; CANNOT BID  
(CONSULTANTS FOR THIS BID)  
WM. RIGG CO.  
777 MAIN STREET SUITE C50  
FORT WORTH, TX 76102-5333

LES PEACH NO LONGER WITH ARTEX BUT  
ARTEX STILL IN BUSINESS. LEFT ARTEX IN LIST  
ABOVE

06/07/2016 – CHANGED COMPANY INFO (ABOVE)  
ATTN: JIM BRUNDAGE  
WELLS FARGO INSURANCE SERVICES  
OF TEXAS, INC.  
2505 EAST MISSOURI  
EL PASO, TX 79903

CHANGED ADDRESS, UPDATED ABOVE  
U. S. RISK  
10210 N. CENTRAL EXPRESSWAY SUITE 500  
DALLAS, TX 75231

LES PEACH IS NOW WITH THE HORTON GROUP,  
ALSO ADDED THEM ABOVE

CHANGED ADDRESS, UPDATED ABOVE  
TEXAS POLITICAL SUBDIVISIONS  
5757 ALPHA ROAD SUITE 625  
DALLAS, TX 75240



## CITY OF EL PASO REQUEST FOR PROPOSAL TABULATION FORM



Project Name: PUBLIC OFFICIALS AND EMPLOYMENT PRACTICES LIABILITY INSURANCE  
Bid Opening Date: JULY 6, 2016

Solicitation #: 2016-1011R  
Department: HUMAN RESOURCES

TEXAS MUNICIPAL LEAGUE INTERGOVERNMENTAL RISK POOL	AUSTIN, TX
USI SOUTHWEST, INC.	EL PASO, TX
RFPs SOLICITED: 11      LOCAL RFPs SOLICITED: 2      RFPs RECEIVED: 2      LOCAL RFPs RECEIVED: 1      NO BIDS: 0	

NOTE: The information contained in this RFP tabulation is for information only and does not constitute actual award/execution of contract.

APPROVED: \_\_\_\_\_/s/ \_\_\_\_\_

DATE: 7/13/16