

**RFQ #868457 - Property and Boiler Insurance  
Evaluation Team Score Sheet**

**ROUND ONE**

Offeror	Alliant Insurance Services	Arthur J. Gallagher	Van Meter Insurance	Willis of Tennessee
Contract Acceptance	Accept	Exceptions Taken	Accept	Accept
ISA Questionnaire (Pass/Fail)	Pass	Pass	Pass	Pass
Corporate Experience and Team Qualifications (40 pts)	33.00	38.00	23.00	36.00
Business Plan (40 pts)	38.00	39.00	25.00	33.00
Project Experience and References (20 pts)	17.00	19.00	7.00	18.00
<b>Total Evaluation Scores for Round One</b>	<b>88.00</b>	<b>96.00</b>	<b>55.00</b>	<b>87.00</b>
<b>Total Weight for Round One</b>	<b>60.00%</b>	<b>60.00%</b>	<b>60.00%</b>	<b>60.00%</b>
<b>Total Weighted Score for Round One</b>	<b>52.80</b>	<b>57.60</b>	<b>33.00</b>	<b>52.20</b>

**ROUND TWO**

Offeror	Alliant Insurance Services	Arthur J. Gallagher	Van Meter Insurance	Willis of Tennessee
Cost Criteria (60 pts)	60.00	55.95	Did not qualify for Round Two	40.52
Coverage Detail (40 pts)	34.00	37.00		34.00
<b>Total Evaluation Scores for Round Two</b>	<b>94.00</b>	<b>92.95</b>		<b>74.52</b>
<b>Total Weight for Round Two</b>	<b>40.00%</b>	<b>40.00%</b>		<b>40.00%</b>
<b>Total Weighted Score for Round Two</b>	<b>37.60</b>	<b>37.18</b>		<b>29.81</b>
<b>FINAL EVALUATION SCORES</b>	<b>90.40</b>	<b>94.78</b>		<b>82.01</b>

**Evaluation Comments**

Alliant Insurance Services

Strengths - Key Personnel years of experience. Detailed Business Plan; emphasis on customer engagement; customer pool base; KPI's listed; risk management training and other supplemental services/products listed. Coverage Detail: Upside in margin clause of 110%; \$10 million limit on debris removal; \$1 million in Professional Fees coverage.

Weaknesses - No comment on financial strengths in Corporate Experience. Lacking detail regarding Boiler insurance within Business Plan. Project Experience was lacking detail. Only 3 references listed that responded back. Coverage Detail: Exception of Zone A and V flood coverage; Coverage detail not concrete and contingent to change.

### **Arthur J. Gallagher**

Strengths - Strong Corporate Experience and Team Qualifications; Key Personnel years of experience; creative solutions listed out in Corporate Experience and Team Qualifications. Strong Business Plan illustrating their use of visuals, facts, and data with customers; strong technology use; detail on Boiler Insurance. Coverage Detail: \$1 Billion per Occurrence; \$15 million limit on debris removal; \$500,000 in Professional Fees coverage; Highlighted improvements in Coverage Detail from past contract performance.

Weaknesses - No comment on financial strengths in Corporate Experience. Weak detail regarding work capacity of Key Personnel. No addresses listed for references. No detail on capacity and complexity of references listed.

### **Van Meter Insurance**

Strengths -

Weaknesses - Weak Corporate Experience; small client base size as compared to what Metro is seeking. No representation of work capacity. Lack of detail and no explanation regarding the requested information within the Business Plan. Failed to list email addresses for reference check verification. Limited detail on Project Experience.

### **Willis of Tennessee**

Strengths - Corporate Experience with regards to client size. Key Personnel years of experience. Accuracy within the risk assessment to the underwriter under the Business Plan. Project Experience listed higher in scope, size, and complexity than Metro's needs. Coverage Detail: Upside in margin clause of 125%.

Weaknesses - No representation of work capacity of Key Personnel. Lacking detailed explanation within Business Plan. Only had 2 references listed that responded back. Coverage Detail: Exception of Zone A flood coverage in Coverage Detail; \$1 million limit on debris removal; \$100,000 in Professional Fees coverage.

Enter Solicitation Title & Number Below			
Property and Boiler Insurance, RFQ# 868457	Lowest Bid		
		\$1,692,109.08	60
Offeror's Name	Bids	Evaluation Amount	RFP Cost Points
Alliant Insurance Services	\$1,692,109.08	\$1,692,109.08	60.00
Arthur J. Gallagher Risk Management Services, Inc.	\$1,814,665.00	\$1,814,665.00	55.95
WillisHRH of Nashville	\$2,505,854.00	\$2,505,854.00	40.52

# PNP Compliance Results Form

<b>Department Name: Legal</b> <b>RFP/ITB Number: 868457</b> <b>Procurement Name: Property and Boiler Insurance</b>		
<b>Primary Contractor</b>	<b>PNP Compliant (Yes/No)</b>	<b>Determination Comments/% of Participation Proposed or Bid</b>
Arthur J. Gallagher Risk Management Services	Yes	The prime reached out to the following MWBE's for the mentioned solicitation: Alexander & Assoc. (10%) Accepted, Prince Insurance Agency (declined, due to lack of experience), and Cushion Employer Service (declined, due to lack of experience)

\*Denotes Contractor with whom follow up was required  
 Date: 4/28/16  
 Metro Buyer: Kevin Edwards  
 BAO Rep: Bryan Gleason