

March 15, 2007

07-055

ACCEPT PROPOSAL/AWARD CONTRACT FOR THE
AGENT OF RECORD FOR PROPERTY AND LIABILITY
INSURANCE TO JBL&K RISK SERVICES

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FINANCIAL
RESPONSIBILITY:

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REPORT:

Safety and Risk Services (Financial Services) has a need to contract to provide professional services as an agent of record for the College's property and liability insurance needs. The services include, but are not limited to: formulate and maintain insurance program(s), write and service insurance policies (as requested by the College), assist staff in managing insurance policies and procedures, maintain and make available claims records, respond to questions and provide assistance for those individuals who need help with school coverage or loss prevention, and other requirements. The current contract expired on February 28, 2007 and since the estimated expenditure will exceed the \$100,000 threshold, a formal competitive process is required to award the new contract.

On November 21, 2006, the Request for Proposal (RFP) for the Agent of Record was released and made available to all interested vendors. The RFP was advertised in the Daily Journal of Commerce, State of Oregon ORPIN vendor system, and PCC Solicitation website. Initially, eleven (11) vendors, of which three (3) were MWESB firms, were notified and received a faxed copy of the project summary that includes instructions on how to access the RFP document on the PCC website.

On the RFP closing date/time of December 7, 2006 at 3:00 P.M., the College had received a total of four (4) proposals. These proposals were evaluated and scored by the committee members based on the following criteria: Qualifications/experience, proposed methodology, clients/references, and cost. The following is a list of proposals received and their final scores:

Proposers name	Scores
Acordia of Oregon, Inc	213
JBL&K Risk Services	248
Marsh USA, Inc	227
Willis of Oregon, Inc	234

The committee selected the top three (3) proposers to interview: JBL&K, Marsh USA and Willis of Oregon. After reviewing the proposals, the committee recommends awarding the contract to JBL&K Risk Services because of their wider range of experience with educational institutions and their proposed fee is lower compared to the two (2) other proposals.

Note: none of the proposers are MWESB firms

RECOMMENDATION:

That the Board of Directors accept the proposal and award the contract to JBL&K Risk Services. The contract will be valid initially for one (1) year with an option to renew annually for two (2) additional years. The contract amount is estimated to be \$120,000 for entire term of the contract. Funds will be covered by General Fund.