

Agency:	Risk Management Division
Project Manager:	Jacqueline Love
# of Responders:	4
Initial Evaluation	3/18/2019

Vendor Response Matrix
RFP No. GEN2117482P1, Agent/Broker OCIP Services for Convention Center Expansion and Hotel Project

Evaluation Criteria	Alliant Insurance Services, Inc.	Arthur J. Gallagher Risk Management Services, Inc. d/b/a Gallagher	Marsh USA Inc.	Willis of Florida, Inc. d/b/a Willis Towers Watson
Ability of Professional Personnel and Staffing Plan - 25 Points Total				
<p>(1) Project Manager Qualifications Provide the resume of the Project Manager, describe the specific qualifications (including education, designations and experience) of proposer's Project Manager that make this person qualified to perform and suitable for this project. State the percentage of time the person will be allocating to the Project, as well as the role and specific functions the person will be responsible for in this Project. Describe the person's experience with OCIPs, including experience with OCIPs for construction projects exceeding \$250 million, OCIPs for vertical building construction projects, and OCIPs administered for FL governmental entities.</p> <p>Points Value: 15</p>	<ul style="list-style-type: none"> • Charlotte Smith-Wilkes (Percentage of time assigned on OCIP Project: 20%). <ul style="list-style-type: none"> ○ Responsibilities: Overall oversight, fee negotiations and development of marketing strategies. ○ Resume: provided. ○ Experience: 30+ years' experience in OCIP/CCIP and Florida Public Entities. In Florida, she began her Project career in Miami and has been involved with some of the largest projects in South Florida, including the Miami Heat Arena, Panthers Arena, Port of Miami Tunnel and numerous large and prestigious condominium projects. ○ Total Wrap-up (OCIP/CCIP) Experience: \$46.4 billion, Total Wrap-up (OCIP) Experience: \$37.6 billion, Total Wrap-up Florida Experience: \$20.3 billion ○ Total Wrap-up Public Entity Experience: \$15.2 billion; Total Wrap-up Rolling Program Experience: \$35.5 billion; Total Wrap-up Entertainment Experience: \$ 5,893,500,000; Total Wrap-up Hospitality Experience: \$ 2,710,561,714; ○ Education & Certifications: Charlotte received both her B.S. in Business Administration and her Master's in Business Administration (MBA) from the University of Miami. ○ 2-20 Property & Casualty Agent License; Chartered Property & Casualty Underwriter (CPCU) professional designation in 2013. 	<ul style="list-style-type: none"> • Tony Abella, Jr. (Percentage of time assigned on OCIP Project: 20%). <ul style="list-style-type: none"> ○ Responsibilities: Overall oversight, negotiations and development of program and marketing strategies. ○ Resume: provided. ○ Experience: 29+ years' experience in OCIP/CCIP and Florida Public Entities. ○ Tony's expertise includes program design, marketing, consulting, self-insurance and account oversight for large public entity, educational and non-profit risks. ○ Florida Government Entity OCIP Experience: Broward County Rolling OCIP, 2014-Present, with values of \$1.38 Billion in CV's; Port Everglades CIP, 2018 – 2023, with values of \$540 Million in CV's; Places over \$53.8 billion in total insured values for Public Sector Clients. ○ Education & Certifications: B.S. in Business Administration – Florida International University & Master of Science in Insurance Management (MSIM) from Boston University. ○ 2-20 Property & Casualty Agent License; 1-20 Florida Surplus Lines Agent License; Chartered Property & Casualty Underwriter (CPCU); Associate in Risk Management (ARM); Associate in Reinsurance (ARE); National Incident Management System (NIMS) Certification. 	<ul style="list-style-type: none"> • Sharon Trusky (Percentage of time assigned on OCIP Project: 30-50%). <ul style="list-style-type: none"> ○ Responsibilities: Overall oversight, negotiations and development of program and marketing strategies. ○ Resume: provided. ○ Experience: 20+ years' experience in construction risk management. ○ Sharon has just completed a project valued at \$477M in October 2018 for a large client and works on several of our local Florida real estate development projects. The projects Sharon has been involved in total to roughly \$5.4B in values. Sharon has 20 years of construction experience having worked for two large Florida General Contractors before joining Marsh in spring 2017. ○ Education & Certifications: Associates Degree in Accounting. ○ 2-20 Property & Casualty Agent License 	<ul style="list-style-type: none"> • Debra Stevens (Percentage of time assigned on OCIP Project: 35%). <ul style="list-style-type: none"> ○ Responsibilities: Overall oversight, negotiations and development of program and marketing strategies. ○ Resume: provided. ○ Experience: 20+ years' experience in construction risk management, OCIP. ○ In addition to Property and Casualty insurance, she has experience with managing over \$7.5B of insurance programs such as OCIP and CCIP, Builders' Risk, Pollution Liability, Workers Compensation and Subcontractor Default Insurance (SDI). ○ Total Wrap-up Experience (Florida construction): Turnberry Associates, combined total of \$775M, Surf Club Four Seasons Hotel & Residences, \$450M, St. Regis Hotel & Residences, \$440M, Paramount Condominium at Miami World Center, \$350M, Residences by Armani / Casa, \$270M, Oceana Bal Harbour Condominium, \$250M, Porsche Design Tower, \$210M, and Mansions at Acqualina, \$200M. ○ Education & Certifications: B.S. in Business Administration ○ CRIS (Construction Risk Insurance Specialist) designation; Currently working on completion of CIC Certified Insurance Counselor) designation.

<p>(2) Key Staff Qualifications Describe the qualifications and relevant experience of all key staff intended to work on the account, if awarded. Include resumes. Include the qualifications and relevant experience of all subconsultants' key staff to be assigned to this project. State the percentage of time the person will be allocating to the Project, as well as the role and specific functions the person will be responsible for in this Project. If proposer plans to use subcontractors or joint venture partners, then provide a profile of the staff of such subcontractors or joint venture partners and the services that each subcontractor or joint venture partner staff-person will provide. Include the names, titles, years of experience. Include evidence of all required business licenses, professional certifications and credentials.</p> <p>Points Value: 10</p>	<ul style="list-style-type: none"> • Marie Ramos-Alhadeff (Percentage of time assigned on OCIP Project: 30%). <ul style="list-style-type: none"> ○ Responsibilities: program management and oversight. ○ Experience: 16+ years' experience in OCIP/CCIP & FL Public Entities • Nancy Hamilton (Percentage of time assigned on OCIP: 25%). <ul style="list-style-type: none"> ○ Responsibilities: daily accounting services and OCIP enrollment. ○ Experience: 22 years' experience in OCIP/CCIP and Florida Public Entities; • Marc Reyes (Percentage of time assigned on OCIP: 15%). <ul style="list-style-type: none"> ○ Responsibilities: claims advocate services. ○ Experience: 27 years' experience in construction, OCIP, cost containment and claims. • Charles LaPlante, Esq. (Legal) <ul style="list-style-type: none"> ○ Responsibilities: OCIP contract review and construction litigation advisor. ○ Experience: 20 years' experience in construction claims, risk management, OCIP/CCIP and insurance; legal. • Full-Time Safety: Provided by Insurance Carrier (Percentage of time assigned on OCIP Project: 100%) <p><i>(See proposal submittal for additional staffing information and resumes)</i></p>	<ul style="list-style-type: none"> • Dennis Ourand (Percentage of time assigned on OCIP: 10%). <ul style="list-style-type: none"> ○ Responsibilities: Design and implementation of OCIP/ project risk transfer program with focus on construction, Builder's Risk, Professional and Pollution. ○ Experience: 35+ years' experience in OCIP/CCIP and construction. • Calvin Ellis (Percentage of time assigned on OCIP Project: 25%). <ul style="list-style-type: none"> ○ Responsibilities: Design, implementation and administration of OCIP; Daily management of program including Loss Control and Claims services. ○ Experience: 35+ years' experience in OCIP, construction and Public Entities. • Heidi Greene (Percentage of time assigned on OCIP: 20%). <ul style="list-style-type: none"> ○ Responsibilities: Design, marketing and implementation of OCIP and administration services. ○ Resume: provided. ○ Experience: 30+ years' experience in insurance brokerage services and risk transfer programs, and 19+ years' experience with Public Entities. <p><i>(See proposal submittal for additional staffing information and resumes)</i></p>	<ul style="list-style-type: none"> • Walter Viteri (Percentage of time assigned on OCIP: 30%). <ul style="list-style-type: none"> ○ Responsibilities: Overall oversight, negotiations and development of program and marketing strategies. ○ Experience: 16+ years' experience in risk management and insurance. • Jorge Vinat (Percentage of time assigned on OCIP: 25%). <ul style="list-style-type: none"> ○ Responsibilities: Overall oversight, negotiations and development of program and marketing strategies. ○ Experience: 12+ years' experience in risk management and OCIP, Builder's Risk, CPL, Professional liability program. • Corey Finnegan (Percentage of time assigned on OCIP: 75-100%). <ul style="list-style-type: none"> ○ Responsibilities: Development and management of OCIP and daily program, enrollment, and auditing. ○ Experience: 35+ years' experience in risk management, insurance; 20 years' experience in OCIP/wrap-ups & construction. <p><i>(See proposal submittal for additional staffing information and resumes)</i></p>	<ul style="list-style-type: none"> • Jonathan Perrillo (Percentage of time assigned on OCIP: 20%). <ul style="list-style-type: none"> ○ Responsibilities: Overall oversight, claims oversight. ○ Experience: experience in risk management and insurance, OCIP. • Jackie Golden (Percentage of time assigned on OCIP: 5%). <ul style="list-style-type: none"> ○ Responsibilities: Administration of OCIP brokerage services. ○ Experience: 15+ years' experience in risk management and insurance. • Russel Amend (Percentage of time assigned on OCIP: 30%). <ul style="list-style-type: none"> ○ Loss Control Services and management ○ Experience: 30+ years in risk and safety management. • Pati Caldwell (Percentage of time assigned on OCIP: 25%). <ul style="list-style-type: none"> ○ Claims Advocacy Services ○ Experience: 13+ years in risk and insurance, claims and OCIP/wrap-ups. • OCIP Administrator: (Percentage of time assigned on OCIP: 95%) –To be assigned at Award <p><i>(See proposal submittal for additional staffing information and resumes)</i></p>
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<p>Project Approach – 25 Points Total Describe the proposer's approach and plan to satisfy all requirements of the Scope of Services to the project, including on-site services and staffing, demonstrated understanding of laws, rules and regulations and ability to verify compliance. Include how the proposer will use subconsultants in the project, if applicable. Include proforma of OCIP program savings anticipated under the proposer's approach.</p>				
<p>(1) Understanding of the Scope of Work and Regulatory Compliance Describe proposer's understanding of the Scope of Services, approach and plan to satisfy all requirements of the Scope of Services in complete compliance with all federal, state and local laws, statutes, ordinances, rules and regulations. All deviations from this RFP and its requirements should be noted herein.</p> <p>Points Value: 10</p>	<p>Alliant is committed to providing all of the services necessary to design, implement, and monitor a highly efficient and cost-effective OCIP program from inception to close. Our approach for these services have been detailed throughout our response (primarily in our response to 2.2 on the following pages) and include: Program Design, Marketing, Procurement, Administration, and Loss Control. Throughout the careers of</p>	<p>We have read and familiarized ourselves with all 76 individual items enumerated in Sections 2.2.1 through 2.6.8.3 and can assert that we understand the scope or work enumerated as part of the RFP. Gallagher has the requisite experience, staffing and ability to satisfy all requirements outlined in the of the Scope of Work in</p>	<p>Our objective is to maximize the return on your risk management investment through increased efficiency, improved business-risk decisions, and lower cost. We start by determining your risk management philosophy and understanding your operational and financial objectives. We then analyze your critical project risks, work to quantify your total cost of risk, optimize program design and</p>	<p>Willis Towers Watson has reviewed the Scope of Services and the Regulatory Compliance and plan to satisfy the requirements contained in the Scope of Services pdf file.</p> <p>WTW plans to work closely with the County once awarded the will work with them cohesively to resolve any misunderstandings or incorrect assumptions contained below.</p>

	<p>the team members that will be involved in this OCIP, we have been very successful in providing these types of services on many other similar OCIP projects.</p> <p><i>(See proposal submittal for additional information)</i></p>	<p>complete compliance with all federal, state and local laws, statues, ordinances, rules and regulations.</p> <p><i>(See proposal submittal for additional information)</i></p>	<p>risk financing, and, finally, implement a program that minimizes retained losses and manages your risk in the most cost-effective manner.</p> <p><i>(See proposal submittal for additional information)</i></p>	<p>The Business Continuity Management fee is \$235/hour plus travel and other expenses. The amount of hours required will be determined by the scope of the plan.</p> <p><i>(See proposal submittal for additional information)</i></p>
<p>(2) Approach to providing OCIP Services</p> <p>Provide a conceptual description of proposer's approach and plan to satisfy all requirements of the Scope of Services. Describe proposer's services which will be made available to County including, but not limited to: (a) development and management of OCIP Program including proposed strategies for structuring the OCIP, (b) insurance brokerage services, including access to major insurance companies and other potential markets, and demonstrated understanding of current market conditions, (c) safety and loss control services, (d) claims services, and (e) risk management information services (RMIS) system. The description of services should denote what services (if any) require additional cost to County. Include a description of how proposer will place required insurance policies, assist in the enrollment of contractors/subcontractors, monitor OCIP program performance, monitor contractor/subcontractor compliance, assess program costs/savings, assist County with development of contract language when requested to do so by the County Attorney, assist County with the development of program-related manuals and materials, and assist County with OCIP program training and education of contractors/subcontractors. Describe proposer's approach and plan to satisfy personnel requirements including management personnel and on-site safety/loss control personnel. All deviations from this RFP and its requirements should be noted herein.</p> <p>Points Value: 10</p>	<p>2(a) Development and Management of OCIP Program:</p> <p>Our focus throughout the administration of the Project will be to manage the program with minimal burden on the County and its contractors. We accomplish this through up-front education, consistent procedures and the use of WrapX, our state-of-the-art wrap-up administration system. Our system enables efficient, paperless administration throughout the entire administration process. Below are some of the activities we will implement to ensure success on the County's Program.</p> <p><u>Development/Review of Contract Language:</u> In order to ensure that contractors are in compliance with the County's insurance requirements, the County's contract documents must include the appropriate language reflecting the insurance coverage provided and the requirements, roles and responsibilities of contractors enrolled in the OCIP. Alliant will review the County's construction contract documents to ensure that they include the appropriate OCIP language.</p> <p><u>Development of Insurance Manual:</u> In addition to the development of contract language, we will issue an OCIP insurance manual to help contractors fully understand the program and its requirements. The manual is a simplified, more 'user friendly' document that is incorporated into the contract by reference. It will address the insurance requirements of the projects and the County's expectations of contractors, such as procedures for enrolling and reporting payroll for the program. As with other documents to be produced for this project, the procedures manual will be developed in conjunction with the County's in-house and outside counsel.</p> <p><u>Alliant WrapX Project Setup:</u> Alliant WrapX is the primary tool that will be used in administering the County's program.</p>	<p>2(a) Development and Management of OCIP Program:</p> <p>Gallagher will work closely with the County's Convention Center Expansion and Hotel project team in designing the optimal OCIP program structure that will meet the various needs of the project, provide the broadest coverage, and comply with all relevant rules and regulations, while minimizing the overall cost of risk for the entire project. There are several options for program structure, most notably whether or not to include workers compensation coverage and how best to address the professional liability exposures for the project.</p> <p><u>Program Placement:</u></p> <p>The most significant benefit of the owner-placed coverage option for Broward County is the eligibility for public assistance in the event of a federally declared disaster. This could help offset the impact of the named windstorm deductible or provide additional protection should the losses exceed the amount of insurance purchased.</p> <p><u>CORE360 model:</u> Comprehensive way to manage the County's risk. Includes: Insurance premiums, Program Structure, Coverage Gaps, Uninsured & Uninsurable Losses, Loss Prevention & Claims, and Contractual Liability.</p> <p><u>Assist County with Development of Contract Language.</u></p> <p><u>Assist in Enrollment and Monitor Contractors and Subcontractors for Compliance:</u> Once a new project is enrolled, we work with the project team to establish protocols for identifying new subs and getting them enrolled. We have a system of checks and balances to minimize the potential of one "falling through the</p>	<p>2(a) Development and Management of OCIP Program:</p> <p>We create insurance program and risk management value by aligning with Broward County's objectives. Construction Risk Management Services benefits of tools and specialized resources to help assess project risk, and select effective treatment methods to prevent losses, mitigate the impact of losses that do occur, and provide insurance coverage to indemnify injured parties.</p> <p><u>Preliminary Risk Assessment</u></p> <p><u>Project Wide View of Risk:</u> At Marsh, we believe that insurance is just one element of construction risk management, and that risk management is just one element of construction management. We will recommend solutions that support your overall project goals, and avoid solutions that might save a dollar on an insurance report but cost two dollars elsewhere on your project.</p> <p><u>Wrap-up Administration Services</u></p> <p>As part of Marsh's pre-planning phase, we will provide Broward County with legal templates for OCIP enabling language and develop an insurance manual which will evidence the coverage to be provided and the requirements for the contractors when they are working on the project.</p> <p><u>Contractor Enrollment, Administration, and Policy Issuance</u></p> <p>The initial process will begin in the Pre-Bid phase, with the General Contractor providing each of the eligible contractors with a copy of Broward County's OCIP Insurance Manual. The manual contains the procedures for enrollment and the</p>	<p>2(a) Development and Management of OCIP Program:</p> <p>We take a highly structured and disciplined approach to implementing and managing an OCIP. Our experience confirms that a well-coordinated program delivering excellence in all five of these elements will deliver superior outcomes and can therefore yield substantial financial and performance benefits for the County.</p> <p><u>Identifying and evaluating risk:</u> Willis Towers Watson has put forth significant capital in our analytical tools. As the analytical broker, we take a different approach to broker activities. We review your organization's data, exposures, successes, and challenges to support a plan of action. Our goal is to develop a comprehensive review that allows us to collectively make more informed decisions that are in sync with the stated risk management goals.</p> <ul style="list-style-type: none"> ■ Actuarial models to analyze and trend historical loss experience ■ Models that assist with the selection of appropriate retentions ■ Peer benchmarking including models to help determine appropriate casualty limits ■ Alternative funding arrangements including collateral, specialized reinsurance and structured risk programs ■ Project Risk assessment procedures and protocols. <p>Through the early application of these techniques we try to arm you with the information and tools needed to best support a winning strategy and maximize project profitability while appropriately protecting the County and ensuring control over the project's critical path.</p> <p><u>Benchmarking and Proprietary Modelling:</u> Willis Towers Watson has developed a suite of proprietary casualty and property modelling tools</p>

	<p><u>Contractor Enrollment/Audit Process:</u> The enrollment process is a key component to administering a successful project in that the enrollment process ensures contractors are compliant with the project's insurance requirements and are covered by the project. The Alliant administrative team will work in conjunction with contractors and either the County's team to ensure that no contractor commences work unless they are adequately enrolled into the OCIP program.</p> <p><u>Removing Insurance Costs:</u> Alliant will review the current processes & methodology for the treatment of Contractors Insurance Costs within their bid. We will review all alternatives (below) to determine which method is the most appropriate for this project.</p> <p><u>County and Carrier Notifications:</u> Throughout the course of construction ongoing communication is essential. On a daily/weekly basis or as desired, the County will be notified of all contractor enrollments into the project with an enrollment status report sent from WrapX.</p> <p>2(b) Insurance Brokerage Services: We have access to virtually every insurance carrier that provides offerings in the construction space and in fact in many cases, Alliant is their #1 broker for construction. Industry is in a place of continued upward adjustment, and the market has yet to enter a "hard market."</p> <ol style="list-style-type: none"> 1. Information Gathering and Risk Analysis: Alliant will use a customized construction risk analysis matrix when analyzing overall project exposure basis in all phases of the project. 2. Next will be a strategy session with the County to plan and review goals, assess strengths and weaknesses of the approach to be taken, evaluate current market conditions and their potential impact on the program, and changes (short and long-term) in the County's operations. 3. Market Selection: All markets having OCIP capabilities will be contacted to provide quotations for this project. 	<p>cracks." It is imperative to the program's success that unenrolled subcontractors not be allowed to begin work on-site.</p> <p><u>Assess Program Costs/Savings:</u> A successful OCIP program requires accurate financial reporting. The County will receive statements with all necessary backup documentation on a monthly basis with the use of two systems.</p> <ul style="list-style-type: none"> ■ Our Agency Management System, EPIC, will maintain and track the cost/savings on insurance premiums and the loss prevention/ safety management personnel. ■ Our RMIS system, VUE, will maintain and track payrolls at the project level and the contractor/subcontractor levels. Our key staff will manage the data inputted into these systems and make necessary reports to the carrier. Gallagher will analyze this data to track OCIP performance and make any changes that may be warranted. <p><u>Assist County with Development of Contractor Manuals and Documentation for Distribution:</u> The OCIP's safety manual must be included and referenced to as part of the bid package for all contractors and subcontractors. The safety manual will clearly establish the expectations of the OCIP's safety program and will provide detailed information regarding the qualification of safety personnel and safety representatives, required safety orientation and safety training, mandatory use of Personal Protective Equipment (PPE), mandatory safety procedures and pre-planning activities, accident reporting procedures, as well as safety disciplinary procedures.</p> <p><u>Assist County with Training and Education of Contractors and Subcontractors</u></p> <p>2(b) Insurance Brokerage Services:</p>	<p>procedures for completing the Insurance Cost Worksheet – which is the method by which the contractors provide their insurance cost estimates. Marsh reviews and submits the form to the insurers to ensure coverage through our on-line system, MWrap.Marsh's MWrap system (which is detailed further in this proposal) simplifies the bid credit verification and enrollment process by combining all the necessary information into a single enrollment process in our on-line system with both credit validation and enrollment. This is a benefit to the contractors and is designed to provide a seamless and streamlined approach for the contractors in the OCIP.</p> <p><u>Payroll Reporting and Audit</u> Marsh will collect and monitor Non-CIP certificates and provide regular reporting on compliance and waivers throughout the life of the project.</p> <p>2(b) Insurance Brokerage Services: Marsh has unparalleled experience working with our clients to develop and deliver construction insurance programs that work. We are able to deliver the best possible pricing, terms, and conditions because of our construction risk expertise, knowledge of insurers' preferences, market volume, and the strong market relationships we have built over time. Based on our experience, we have detailed below some of the issues which affect OCIP placements:</p> <ul style="list-style-type: none"> ■ Marsh will review contracts, safety programs and pertinent bid documents as needed and coordinate with the County Attorney's office and the Developer regarding terms and conditions of insurance contracts. ■ Marsh will administer all the policies, track placements, provide market information, monitor security limits and provide copies of all policies and endorsements 	<p>that are embedded in our placement teams that empower our brokers and clients with powerful analytics enhancing program design and structure decisions.</p> <p><u>OCIP Administration & Management:</u> Coordination between the project team members is crucial in the success of an OCIP. Willis Towers Watson will establish clear lines of authority, accountability, and communication between the OCIP team, Insurance Carrier(s), Construction Management, Contractors, and the County. We will be proficient and effective at communicating with all members of the team while always keeping the County's goals and objectives in mind.</p> <p><u>Enrollment Functions, Pre-bid/Pre-construction meetings, Payroll tracking, OCIP Manuals and Contract Language:</u> Closely related to communication is the development of clear and enforceable contract language and an insurance manual to outline the program processes and requirements. Once the OCIP Manual is finalized we will work with you and your legal counsel to amend contract language, if necessary, and tailor the insurance manual to coordinate with the contract language.</p> <p><u>Certificates of insurance:</u> We recommend that the Contractors submit certificates of insurance as a condition of enrollment. If required, we have a system that has the capabilities to track expiration dates of Contractors' certificates of insurance. Should any Contractors not be in compliance with the contract requirements, we will request that you review the certificates and advise if you want to enforce the contract or accept the certificates.</p> <p><u>Contractor insurance credit management:</u> If the Contractor does not provide the appropriate policy information within 10 days from enrollment to confirm the rates used on the enrollment form we follow up and may ultimately have to utilize manual rates without the benefit of any credit modifiers or scheduled credits for insurance credit calculation. As negotiated with the carriers, we will</p>
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	<p>4. Insurance Market Financial Security Assessment: We will approach carriers for this project with the strongest ratings possible.</p> <p>5. Negotiation and Review of Final Results</p> <p>6. Review of Final Marketing Results & Procurement</p> <p><i>(See charts provided by proposer beginning on page 18 of submittal package)</i></p> <p>2(c) Safety and Loss Control Services: Alliant takes loss prevention very seriously. Thus, we operate under a philosophy of establishing collaborative goals with owners/sponsors, contractors and other stakeholders for each project/program to take an "incident free" attitude for all liability exposures. To create this incident-free project culture and environment, we further collaborate with the sponsor to develop a solid foundation of safety procedures and controls at the start of any project/program. Alliant Loss Prevention staffing will work closely with and support the needs of the County Risk and Safety Departments to ensure all entities involved are constantly striving to meet the established goals. Alliant will be providing a Safety Director to coordinate all services. We will be requiring the selected carrier to provide a full-time on-site safety professional. We will review with Broward County the desired credentials before selecting the appropriate onsite staff.</p> <p>2(d) Claims Services: Alliant's workers compensation specialists and our general liability claims specialist are construction claims experts with more than 25 years of experience combined supporting large OCIPs. They have a deep understanding of the unique requirements of large, complex organizations and construction programs. Our role as your claims advocate will be to ensure that the carriers handle the County's claims appropriately and to advise the County on more complex claims issues. Here is a recent and "real-life" example of our claims advocacy in action. While we will track all OCIP claims, our focus will be on applying our expertise on those to which we can add the most</p>	<p>As one of the 4 largest insurance brokers in the world, Gallagher places a substantial amount of business with each of the insurance markets that will be approached for this opportunity. In addition to the influence that our book of business brings, our specialty practice leaders (Construction, Wrap-Up, Property and Public Sector) maintain relationships at all levels of the insurer's organizations. This allows us to efficiently take any problems that arise to the appropriate level within the organization in an effort to expedite resolution. Market conditions are still favorable at this time for a number of reasons. While construction work has increased significantly throughout the entire Southeast region over the past three years, the overabundance of capital in the insurance marketplace has heeled keep insurance prices relatively stable over this period. Thus, unlike we have experienced in other construction "boom cycles", we are not see this increase in demand for insurance drive rates up. We still perceive the market to be a buyer's market as respects liability coverages in general.</p> <p>We recommend underwriter meetings with the project team prior to quotes being submitted. The purpose is to explain the scope of the project in detail to the underwriters get them comfortable with the risks and positioned to provide the most competitive coverage and pricing options.</p> <p>2(c) Safety and Loss Control Services: Ensuring the successful outcome of the OCIP requires active involvement in the loss prevention program's design and pre-planning stages as well as ongoing involvement in establishing a collaborative partnership with key stakeholders in the safety management process. While monitoring contractor compliance with the established loss prevention program requirements will be one primary area of responsibility, we will focus on partnering with the prime contractors and subcontractors to establish high performance safety</p>	<p>throughout the life of our contract with the County. These services include negotiations during the placement process to assure the most favorable terms and conditions and ensuring delivery of the negotiated deal.</p> <p><u>Marsh XSellence Excess Casualty Policy Form:</u> In addition to explicitly following the lead umbrella policy, to eliminate potential coverage gaps and ensure consistency in coverage terms and conditions throughout the entire tower, the Marsh XSellence policy extends beyond insurer crafted follow form policies by offering clarifications and enhancements.</p> <p><u>Risk Register:</u> Based on the size and highly-engineered nature of your planned project, we recommend the development of a Risk Register as an initial and ongoing process for each of your projects. As one of the key initial steps of a robust risk management program, identification and assessment of project risks (both insurable and non-insurable) in a formal and structured process allows for risks to be effectively managed throughout the project lifecycle.</p> <p>2(c) Loss Control Services: Marsh has an extensive network of experienced construction safety and health consultants that specialize in dealing with today's challenges – such as an aging workforce. Recently, we have launched an initiative that is designed to address ergonomics-related issues to mitigate the loss leader on seemingly every construction project: soft tissue injuries. We have also launched MAPP (Marsh Accident Prevention Program), which is designed to review specific jobsite injury exposures. We will provide coordination and oversight of loss control efforts provided by insurer(s) and a broker-provided on-site dedicated safety manager.</p>	<p>have Contractors audited to confirm the accuracy of their reports. We find that leveraging the contractual relationship is an effective way to enforce the program requirements.</p> <p>2(c) Loss Control Services: Willis Towers Watson will assign Russ Amend for Risk Control Oversight. In addition, we plan to use Sub-Consultant, S1 Safety First to fulfill the full time, onsite safety obligations contained in the Scope of Services.</p> <p>Willis Towers Watson Risk Control Services are designed to assist in identifying actual and potential loss areas while working in partnership with our Clients, Carriers, etc. to develop strategies to eliminate or control such exposures that could result in loss.</p> <p>Our services are centered at providing oversight of the loss control program. In doing so, we perform a number of activities that would include:</p> <ul style="list-style-type: none"> ■ Overseeing on-sight safety vendor ■ Acting as the owner's representative with regard to safety and loss control matters ■ Review of communication between parties to assure continuity of safety services and activities ■ Coordination of various loss control (carrier) representative's safety surveys and communication ■ Conduct regularly scheduled loss control surveys to determine current conditions ■ Plan for upcoming construction activities <p>2(b) Insurance Brokerage Services: Willis Towers Watson has developed a suite of proprietary casualty and property modelling tools that are embedded in our placement teams that empower our brokers and clients with powerful analytics enhancing program design and structure decisions. Each model drives unique results to offer our clients true decision support tools. It is the combination of these tools, plus our in-depth knowledge of your claims which will allow us to optimize your program placement to secure the lowest Total Cost of Risk.</p>
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	<p>value and assist in reducing the County's cost of claims.</p> <p><u>Review/Improvements for Claims Reporting Procedures:</u> Review the current claims kit to assure it contains all of the necessary information a contractor will need in the event of a claim; provide recommendations for improvements. Review the overall claims procedures and get input from the general contractors incorporate procedures into the new hire project orientation for each project.</p> <p><u>Review/Improvements for the Return to Work Program:</u> Alliant utilizes internal resources, along with proven and well trusted contractors from our extensive practice policy client base who have successfully crafted and implemented hundreds of Return To Work (RTW) programs. We review the current program and provide input for improvements. The program is coupled with a case manager who works with the medical care provider, the project team, the County, the third party administrator (or carrier based adjuster), and most importantly the injured worker, to minimize the costs of the claim and to get the employee back working. We will interview each of the providers to review the process and success ratios to determine if any changes are required.</p> <p><u>Review/Improvements for the Clinic/Medical Providers:</u> We review the current clinics/medical providers in terms of services for the injured employee, responsiveness, cooperation and collaboration in the return to work process. We want to ensure we have the closest and most qualified clinic that is within the carriers Health Care Network.</p> <p><u>New Claims Reporting:</u> Our team is well versed in the information that a claims handler requires to effectively set up a claim in its initial stages. On an ongoing basis, upon notification of a claim from a contractor, our team works with the contractor and in the case of a Workers Comp claim, the injured party, to obtain all of the necessary information and documentation needed for claim reporting. This gives the County peace of mind that claims will not go unreported or undocumented. This hands-on approach at the inception of a claim provides our</p>	<p>teams to lead the safety initiatives for each of the County's projects. Gallagher will actively provide services with a focus on key categories that will contribute to the success of the OCIP's Loss Prevention and Safety Management Program.</p> <p>Our construction safety professionals all have prior OCIP/CCIP experience and hold a variety of professional designations such as ASP's, CSP's, or CHST's. Many are also OSHA 500 certified and conduct the OSHA 10 hour and 30-hour Construction safety certification training. We will also partner with Professional Risk Control Consulting Services for the augmentation of our capabilities in the Safety and Loss control and training area. Professional Risk Control Consulting Services (PRCS) is a Broward County based firm and hold both CBE and SBE designations from the Broward County Office of Economic and Small Business Development. We partner with David Daley from PRCS in providing services to several Gallagher clients beside Broward County as well and have found them to be an invaluable addition to our team.</p> <p><u>Centralized Construction Safety Plan:</u> Centralized Construction Safety Plans addresses hazard prevention during the pre-planning phase and before the anticipated or identified hazards have an opportunity to manifest. The plan is a proactive approach that will dramatically outperform reliance upon random site safety inspections to discover unsafe worker behavior or dangerous construction sites while work is underway.</p> <p><u>Completion of Job Hazard Analysis (JHA)/Job Safety Analysis (JSA)/ Task Safety Analysis (TSA)/ Process Hazard Analysis:</u> While their names differ slightly, each of the analyses has the common goal of systematically identifying hazards, both actual and potential, by decomposing tasks or job assignments into their individual key</p>	<p>In addition, we will work with Broward County and the construction management group and/or General Contractor to develop a project-specific safety policies and procedures manual. We will work closely with the General Contractor(s) to design and implement the onboarding safety orientation program to ensure that all workers have a clear understanding of this project's safety policies and procedures prior to setting foot on the project. (Our experience is that best results are obtained when this is drafted by the General Contractor.).</p> <p>2(d) Claims Services: Marsh has created the National Construction Claim Practice (NCCP) to support our construction clients. The NCCP consists of 24 senior claim advisors strategically located throughout the United States averaging in excess of 25 years' experience. They provide advocacy services for construction clients and project work, including owner/contractor-controlled insurance programs.</p> <p>Marsh offers support and advocacy in managing insurer services and claims administration, case management consulting on individual claims and participating in claims reviews. The services provide by Marsh's claim advocates include, but are not limited to:</p> <ul style="list-style-type: none"> ■ Customizing special claim-handling instructions; ■ Coverage analysis and intervention; ■ Oversight of high exposure claims; ■ Assistance with settlement strategy on major claims; ■ Reporting property, excess/umbrella, and other complex claims; ■ Facilitation of and participation in periodic claim reviews including a review of project loss runs. <p>We will work with Broward County to establish a plan for the reporting of new claims.</p> <p><u>Claims Management:</u></p>	<p>Willis Towers Watson will analyze and propose a program which will result in a minimum ultimate cost of insurance and provide the broadest coverage and most flexible and fluid services. We will analyze and recommend what risks to retain, and what risks to transfer to the insurers.</p> <p>We solicit multiple self-insured retention and deductible options and analyze the cost feasibility of the proposals including associated security requirement and methods to fulfil those obligations.</p> <p>We believe the review, consideration and inclusion of several other insurance products could enhance the County's overall program and asset protection. These optional coverages include Environmental Liability and Owners Protective Professional Liability insurance. These additional coverages are commonplace on projects of this size and scope. Through restructuring, we can eliminate short buffer layers and maximize global capacity.</p> <p>2(d) Claims Services: With our hands-on approach, our Consultants monitor cross-over claims and strategize with both sets of adjusters and defense counsels to move files towards the most cost-effective conclusion and resolution. Willis Towers Watson has a network of vendor partners that will help Broward County achieve their risk management goals.</p> <p>Meetings and presentations will be scheduled on a monthly and quarterly basis to include claim and safety program reviews with appropriate program personnel, program vendors, Brokers, Willis Towers Watson will assist the insurance carriers' third-party claims administrator investigate, adjust and subrogate every open reported claim in a professional manner and employing industry best practices in accordance with program expectations of claim level, multiple claimants, and frequency or severity standards.</p>
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	<p>team with an intimate knowledge of the claim from the start and thus a stronger ability to manage the claim to closure.</p> <p><u>Monitor Claim Process to Facilitate Claim Closure:</u> The management process begins immediately after the initial report of a claim. Our team monitors both the medical and insurance carrier components of the claim from start to finish.</p> <p><u>Provide Claim Status Reports to Owner and Contractors:</u> Because of the manner in which our team meticulously monitors the claims processes, Alliant has the ability to provide claims status updates at any given point in time. In addition to verbal reports based on claims monitoring, our team can distribute written reports produced by the assigned adjuster from the carrier provided Risk Information Systems. Our team will also coordinate and host claims review meetings with the County, and if desired, representatives from involved parties of the claims such as the General Contractor, on a monthly or quarterly basis.</p> <p><u>Public Relations Crisis Management:</u> During their decades of service to construction claims management, our claims services team has been involved with catastrophic claims that have involved both contractor employees and the public alike.</p> <p>(e) Risk Management Information System (RMIS): Alliant has developed a customized Risk Management Information System (RMIS) for wrap-up administration called WrapX. Alliant WrapX is the most robust, user-friendly, automated wrap-up administration system available.</p> <p><i>(See proposal submittal for additional information)</i></p>	<p>components. Once a hazard is identified in the analysis, we list the controls that are necessary to mitigate or control that hazard.</p> <p><u>Coordinating Insurance Carrier Services:</u> To ensure that services are provided as needed and optimized for Broward County's benefit, Gallagher requires a service plan from each of the insurance carriers that identifies the level of involvement and the desired frequency of project site visits. Gallagher's goal is to ensure services provided by the insurance carrier are optimized for the benefit of the project and safety.</p> <p>2(d) Claims Services: The Claims Management Service is a multifaceted category that involves the interaction of Gallagher's claim personnel, Gallagher's OCIP Brokerage team, Defense Counsel, Medical Provider, Contractor(s), Claimant and other individuals. Responsibilities can be dissected into four categories.</p> <p>(e) Risk Management Information System (RMIS): Gallagher utilizes OCIP administration software, powered by Vue Software. Our Risk Management Information Service System (RMIS) will be customized to send reports at specified intervals, such quarterly, bi-weekly, or monthly, to the owner and general contractor. Reports include information on enrollment status, delinquencies and payroll reporting. Administrators can create tasks for themselves or others to complete at a specified timeframe.</p> <p><i>(See proposal submittal for additional information)</i></p>	<p>Our role will be to act as a Claims Advocate on behalf of Broward County and the adjusters retained to investigate and administer claims. Our responsibilities will include ensuring competent, effective insurer services and/or third-party claims management services.</p> <p><i>(See charts provided by proposer beginning on page 35 of submittal package)</i></p> <p>(e) Risk Management Information System (RMIS): MWrap is an Internet-based tool designed to capture all of the information needed to manage an OCIP.</p> <p>Easily identify anomalies on the contractor's insurance costs calculations. MWrap has been designed with flexibility in regard to the ability to create projects and contractual relationships so that contracts can be moved or realigned as needed. Through the Portal, Contractors can award subcontracts, complete their enrollments, upload documents such as rate pages, and No Known Loss Letters (needed for late enrollments), submit payroll, and closeout contracts. They can also access manuals, certificates, policies or other documents.</p> <p>Marsh's MWrap system allows the contractors to upload their certificate and then Marsh reviews the certificate against the project's contractual requirements to ensure compliance.</p> <p><i>(See proposal submittal for additional information)</i></p>	<p><u>One-Time Events:</u></p> <ul style="list-style-type: none"> - RMIS system set-up - identify three (3) clinics and (1) hospital to be posted with on-site medical team; Provide Authorization to Treat forms for the on-site medical team to send with the injured worker to the clinic; Prepare and provide claims procedures that will be included in the OCIP Manual <p><u>Monthly Events:</u></p> <ul style="list-style-type: none"> - Meetings with Broward County Risk Management personnel, Construction Manager and/or General Contractor, and affected Subcontractors to review all claims, ongoing or closed - Prepare loss run report for Owner, Construction Manager and/or General Contractor, and affected Subcontractors. <p><u>Quarterly Events:</u></p> <ul style="list-style-type: none"> - Claim reviews, Meetings with carrier attorneys, County staff, and Willis Towers Watson Claims Personnel - Quarterly loss reports <p><u>Claims Reporting & Advocacy</u> We will report to the carrier on your behalf the following claim types for which we are the broker of record at the time you report the claim to us.</p> <p>(e) Risk Management Information System (RMIS): Willis Towers Watson utilizes two systems internally that we will use for the administration of the Broward County risk management needs: WillCIP and Risk Intelligence.</p> <p><i>(See proposal submittal for additional information, commencing page 54)</i></p>
<p>(3) Marketing Strategy for the County's OCIP Provide an overview of Proposer's marketing strategy for the County's OCIP, including how proposer plans to provide all the insurance Brokerage and OCIP program services required, a detailed technical plan for accomplishing the tasks to be performed as part of the "Scope of Services," and the proforma of OCIP</p>	<p>The marketing process begins by establishing a timeline based upon the expectations set forth by the County in order to deliver all quotations and bind coverage in a timely manner. From that foundation, our marketing process continues through the following steps:</p> <p><u>Summary of the Sequential Tasks of our Marketing Process:</u></p>	<p>Our marketing strategy begins with the compilation of project specific exposure data including the following items:</p> <ul style="list-style-type: none"> ■ Anticipated construction values ■ Project timelines ■ Safety program details ■ Engineering reports / Geo-tech surveys ■ Assigned Contractor(S) 	<p>Our suggested design for your insurance program is laid out in the chart below. If we were to be awarded the program, our first action would be to sit with you prior to approaching markets and, with a full evaluation of your project design and exposures, confirm this strategy or adjust it as a result of the</p>	<p>We recognize that maximum market influence requires a thoughtful approach, above and beyond the careful application of leverage. Our marketing tactics incorporate detailed technical insight and experience to instill Underwriter confidence and encourage them to consider coverage enhancements and pricing benefits not available to our competitors.</p>

<p>savings to the County anticipated in its proposed OCIP program.</p> <p>Points Value: 5</p>	<ul style="list-style-type: none"> ■ Analytical assessment of the various risks associated with the OCIP ■ Provision of an overall conceptual strategy for procurement of the OCIP ■ Design of a program that entails the broadest available coverage with minimal cost to the County ■ Production of a comprehensive submission which incorporates all elements of the program's design, which will ultimately be presented to underwriters upon approval by the County ■ Review and analysis of quotations in order to determine that all specifications requested by the County are met ■ Provide input/benchmarking/cost benefit analysis to assist the County in deciding on appropriate excess limits ■ Coordinate with the County's availability to schedule interviews with only the highest qualified insurers, if desired ■ Provision of status updates to the County throughout the marketing process ■ Negotiation of acceptable terms and conditions that will provide the most comprehensive and cost-effective coverages available ■ Binding of coverage, invoicing and payment to carriers per requirements and promptly obtaining policies ■ Reviewing the policies once obtained to ensure that all terms, conditions, specifications, and negotiations are met. Verification that all items are met will be delineated by the signature of an authorized representative of Alliant; Preparation of a policy summary ■ Verification of all rates, premiums, and accuracy of audits ■ Submission of all original policies and endorsements to the County ■ Assistance in reviewing and negotiating carrier legal agreements (risk retention/collateral documents) ■ Coordination and obtainment of ongoing services between the County and insurers, including safety, claims management, risk management information systems, health care provider selection, and other applicable services ■ Representation of the County in all negotiations with insurers, underwriters, insurance regulatory authorities, and other parties as respects to the OCIP on an ongoing basis ■ Provision of answers to coverage and program questions the County and/or its 	<ul style="list-style-type: none"> ■ Projected Payrolls ■ Type of construction ■ Number of stories <p>Other considerations we will evaluate in this process include the following:</p> <ul style="list-style-type: none"> ■ The County's risk profile and tolerance for risk ■ Historical relationships with the County and its Insurers ■ Financial Rating, strength, and quality of Insurers <p>We will draft marketing submissions for review with the County and determine the appropriate markets to approach for each line of coverage. We will recommend program design alternatives, including limits of liability, terms and conditions and coverages for the various lines of insurance, and consolidate that information into our market submissions.</p> <p>There are several alternatives to consider as far as providing collateral to satisfy Insurer's security requirements, including the following:</p> <ul style="list-style-type: none"> ■ Letter(s) of Credit – an irrevocable LOC issued in favor of the insurer in an amount that will secure the anticipated incurred losses within the deductible assumed by the County. ■ Cash Collateral – Insurers may require a cash deposit equal to expected losses. This money is held until sometime after completion of the last project and the final disposition of all claims. A balance must still be maintained for the potential claims which may arise during the 10-year extended reporting period for construction claims. ■ Working Cash Loss Fund – A trend for Sponsors is to deposit an amount equal to expected losses in escrow. The Insurer then pays claims but is reimbursed by drawing down the cash deposit. If losses exceed projections, the Insurer has the right to require an additional cash deposit or other form of collateral. Insurers understand that collateral requirements are a major consideration in selecting a program. Insurers have to offer flexible alternatives to an LOC including escrow accounts, interest-bearing accounts, etc. Such alternate 	<p>additional information we take away from our discussions with you.</p> <p>Marsh has significant experience working with organizations similar to Broward County to develop and deliver construction insurance programs that work. We are able to deliver the best possible pricing, terms, and conditions because of our construction risk expertise, knowledge of insurer preferences, market volume, and the strong market relationships we have built over time. All marketing and associated activities will be achieved within the Marsh team structure laid out for you previously.</p> <p>Marsh places more than \$10 billion in casualty premiums globally. We are the casualty broker for more than 57% of the Fortune 100 and the largest producer for most insurers. Our placement specialists are networked to other construction placement specialists across the country and in London, and we have developed a forum for a regular exchange of information regarding pricing trends, program specifications, available terms and conditions, and possible new market entrants.</p> <p><u>Market Symposium</u></p> <p>Marketing will be best handled in collaboration with the insurers' senior decision makers and Broward County representatives. To ensure the best possible response within the insurance marketplace given the size, and nature of your planned projects, Marsh proposes hosting a Market Symposium involving all insurers who wish to participate together with Broward County' risk management, project engineering and construction management teams. We would prequalify all markets participating in the Symposium to ensure that they are viable options who can provide competitive options on your OCIP. This symposium will be held at Broward County's location with the insurers coming to you. Marsh will facilitate the meeting and</p>	<p>We will use all of the analytic tools at our disposal and our extensive market knowledge to determine the most advantageous combination of retentions, limits purchased and coverage specifications. The marketing process begins with the gathering of project data and the development of carefully customized marketing submissions for the OCIP and other relevant placements. We know how important it is to gather thorough project data and package it in a fashion that it stands out on the underwriter's desks and makes it easy for them to understand the program's risks. We typically utilize a web-based marketing facility designed to make the process as easy as possible for all parties in addition to a written detailed marketing summary published for the insured.</p> <p>It is critical to have a well-structured approach to marketing. The best program results are achieved by adhering to core fundamental principles:</p> <ul style="list-style-type: none"> ■ Provide the market with ample time to underwrite the project. Generally, insurers need six to eight weeks to complete the process which includes at least 30-days to complete a risk control survey. ■ Utilize the best technology the industry has to offer through the use of an online marketing website. This website allows the efficient transfer of large amounts of program/project data to the underwriters and their engineers. ■ Establish a collaborative approach to marketing – we will actively encourage the project team and other relevant and project stakeholders to participate in the process. Underwriters will want to meet with and discuss the projects with their prospective insureds. ■ Ensure that the underwriters are provided with the opportunity to visit the project sites. This will be coordinated with the meetings discussed above. Willis Towers Watson will have the responsibility of organizing the meetings in the most effective and efficient manner.
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	<p>consultants or contractors in a timely manner.</p> <ul style="list-style-type: none"> ■ Monitor Insurer's financial information and status. Alliant typically relies upon rating agencies for this type of market analysis. Both A.M. Best and Standard and Poor have been industry leaders in this area for many decades, utilizing a combination of quantitative and qualitative analysis of the information available in formulating their ratings. <p><i>(See proposal submittal for additional information)</i></p>	<p>arrangements do not materially affect program costs but are important cash flow issues to evaluate. Gallagher has been successful in using the above marketing process, which has been confirmed through our recent marketing efforts for other similarly sized OCIPs and CCIPs, to the County's advantage.</p> <p><i>(See proposal submittal for additional information)</i></p>	<p>prepare the Broward County team with expected questions to expect from the underwriters and their loss control specialists.</p> <p><i>(See proposal submittal for additional information)</i></p>	<ul style="list-style-type: none"> ■ Clear and comprehensive communication of project risk control measures at both strategic and tactical levels. ■ Consider all market options ■ Establishing open and honest negotiations between the Owner, its advisors, Willis and the insurers is key. <p><i>(See proposal submittal for additional information)</i></p>
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Past Performance – 20 Points Total

<p>Describe and provide evidence of proposer's experience on projects of similar nature, scope and duration, along with evidence of satisfactory completion, both on-time and within budget, for the past three (3) years. Provide a minimum of three OCIP's with references.</p> <p>Provide references for similar work performed to show evidence of qualifications and previous experience. Refer to Vendor Reference Verification Form and submit as instructed. Only provide references for non-Broward County Board of County Commissioners contracts. For Broward County contracts, the County will review performance evaluations in its database for vendors with previous or current contracts with the County. The County considers references and performance evaluations in the evaluation of Vendor's past performance.</p> <p>Describe any prior experience your firm has had in assisting clients with FEMA-related claims and reimbursements. Provide information about proposer's history and organization, including but not limited to the number of employees, number of offices, and office locations.</p>	<p>On a national basis, over the past 3 years, Alliant has provided OCIP/CCIP (and other project related insurance) services on over \$55 Billion in project values.</p> <p>FEMA: Alliant is uniquely positioned to assist the District with FEMA and Disaster Claims Support for your property program. Alliant has extensive experience navigating large, catastrophic property losses which by their very nature, involve coordinating insurance compliance with FEMA in addition to making a successful claim with the insurer. We have listed a sampling of our experience in this key area followed by actual case studies involving large catastrophic property events. When Hurricane Andrew hit Miami in 1992, Charlotte was responsible for the following public entity accounts: Miami-Dade Water and Sewer, Miami-Dade County HUD, and Jackson Memorial Hospital. Each of these entities incurred multi millions in property losses. This included assisting with damage assessments; information gathering; releasing instructions for repair bid specifications; getting interim advance payments; preparing the claim submittal; negotiating with the carriers for the final claim amount and assistance with FEMA documentation and questions/requests for clarifications. Alliant successfully obtained a replacement to reinstate limits for all of our clients. This critical accomplishment allowed our clients to meet this FEMA insurance condition for obtaining their grants from FEMA. Our efforts helped our clients recover over \$200,000,000 of insurance proceeds and over \$150,000,000 of FEMA grants.</p> <p><i>(See proposal submittal for additional information)</i></p>	<p>The most significant benefit of the owner-placed coverage option for Broward County is the eligibility for public assistance in the event of a federally declared disaster. This could help offset the impact of the named windstorm deductible or provide additional protection should the losses exceed the amount of insurance purchased. In addition to this, Broward County enjoys exemption from surplus lines taxes which are currently set at 5%, providing additional cost savings for the project.</p> <p>As far as the decision to place separate coverages for the hotel and the convention center, the one obvious benefit is the ability to allocate the costs to each of these components without having to do so formulaically. Additional benefits of owner-placed coverage is the ability to negotiate terms and conditions including deductible options, increased sub-limits, better overview of change orders and more leverage in the event of a claim where a contractor and/or sub-contractor may be at fault. Contractor-placed builders risk coverage is procured and managed by the contractor and built into the cost in the bid. Often the premium allocated for the builder's risk insurance policy is not specifically disclosed in the bid. Contractors are not eligible for public assistance through FEMA and would have to fund any losses within the deductibles out of pocket or via a change order.</p> <p><i>(See proposal submittal for additional information)</i></p>	<p>Marsh is highly experienced advocating for construction risks on projects with governmental entities across the US. Within Marsh's Construction Practice is our Project Risk practice, a unit dedicated to working with clients on OCIPs and CCIPs, and offering advisory on other associated risks of a project under construction. Our Project Risk team includes more than 60 dedicated colleagues, plus our loss control and claims experts. Overall, the Marsh Project Risk team has managed a considerable volume of projects over the years.</p> <p>Marsh is a global leader in insurance broking and risk management. We have over 33,000 colleagues working together to serve clients in more than 130 countries (including 82 offices in the US). Marsh is a wholly owned subsidiary of Marsh & McLennan Companies (MMC), a global professional services firm offering advice and solutions in the areas of risk, strategy, and human capital.</p> <p>FEMA: Our Forensic Accounting and Claims Services (FACS) Practice is a leading provider of FEMA and insurance advisory services for public entities across the United States. We offer unparalleled resources in FEMA advisory and claim service solutions.</p> <p><i>(See proposal submittal for additional information)</i></p>	<p>Willis Towers Watson is the preeminent construction insurance broker in Florida. Willis places over \$3billion of construction insurance premiums annually and handles more OCIPs than any other insurance broker.</p> <p><u><i>(See charts provided by proposer beginning on page 64 of submittal package)</i></u></p> <p>FEMA: Comprised of highly qualified certified public accountants, chartered accountants, forensic accountants, certified fraud examiners, project managers, and engineering and construction consultants, Willis Towers Watson's Forensic Accounting & Complex Claims (FACC) Practice provides technical solutions for both pre-event and post-event claim needs. We're uniquely suited to help you design and implement solutions that will strengthen your organization.</p> <p>We provide expert assistance with the quantification of damages and claim preparation related to business interruption and property damage insurance claims, FEMA claims, fidelity/bond/crime claims, builders risk claims, subcontractor default claims, third-party and liability claims, among others.</p> <p>FACC will provide assistance at our blended rates of \$295/per hour for insurance claims and \$250/per hour for FEMA claims.</p> <p><i>(See proposal submittal for additional information)</i></p>
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<p>(1) Experience with OCIPs and Large Construction Projects</p> <p>References provided by proposer should include reference(s) for which proposer has provided services relating to the placement and servicing of an OCIP for large and/or vertical building construction projects, similar to those Project described in this RFP. Proposer should include information relating to the dates such services were provided, the total insured value of the similar project, the total construction value of the project(s) in the OCIP, the lines of coverage that were included in the OCIP program, and any unique factors attributed to the OCIP.</p> <p>Points Value: 10</p>	<p>We have demonstrated our Alliant's SE Regional team experience by including the following summary statistics along with a listing of our projects noting their relevance either by the fact that they are in Florida, are OCIP's, are for Public Entities and/or are Hotel/Convention Center projects. See appendix for complete project listing. Total SE Team Projects: 1,200+ projects with value of \$100 billion; 1,000+ OCIP projects with value of \$77 billion; SE Team Public Entity Project Values: \$20 billion; OCIP projects with value of \$19 billion; Total SE Team Hotel/Convention Center Project Values: \$17 billion; OCIP projects with value of \$14 billion; Total SE Team Florida Project Values: \$54 billion; OCIP projects with value of \$36 billion.</p> <p><i>(See proposal submittal for additional information)</i></p>	<p>The Construction Practice is Gallagher's largest with over 5,000 Construction clients and \$2.5 billion of Construction premium placed annually. We write over 60 rolling CCIP programs and excess of 40 subcontractor default programs and over \$7 billion in covered subcontract volume. Key team members as identified do indeed have experience with OCIPs with construction values in excess of \$250 million. Additionally, key team members identified have dealt with OCIPs for Florida governmental entities and have experience in structuring, placing, implementing and /or administering OCIP programs.</p> <p><i>(See proposal submittal for additional information)</i></p>	<p>Marsh is highly experienced advocating for construction risks on projects with governmental entities across the US. Within Marsh's Construction Practice is our Project Risk practice, a unit dedicated to working with clients on OCIPs and CCIPs, and offering advisory on other associated risks of a project under construction. Overall, the Marsh Project Risk team has managed a considerable volume of projects over the years. More specifically, for the years 2015 through 2018, we managed the following in terms of active programs: 2015, 188 Programs; 2016, 163 Programs; 2017, 155 Programs; 2018, 123 Program.</p> <p><i>(See proposal submittal for additional information)</i></p>	<p>Willis Towers Watson is the preeminent construction insurance broker in Florida. Willis places over \$3 billion of construction insurance premiums annually and handles more OCIPs than any other insurance broker. A short list of notable Controlled Insurance Programs that we've administered in the Southeast region is provided. The below list also includes our Active CIP Projects as well as a notation for Rolling / Master Wrap Up Programs. Our Atlantic / South CIP Experience: Alabama OCIPs, Florida OCIPs, Florida CCIPs, Georgia OCIPs, Louisiana OCIPs, Louisiana CCIPs, North Carolina OCIPs, North Carolina CCIPs, South Carolina OCIPs, Radnor CIPs, Multiple States OCIPs, Multiple States CCIPs.</p> <p><i>(See proposal submittal for additional information)</i></p>
<p>(2) Experience with Florida Government Insurance Programs</p> <p>References provided by proposer should include reference(s) that are Florida governmental entities for which proposer has provided and serviced insurance-related programs (i.e., workers' compensation, general liability, public officials' liability, automobile, crime, etc.). Proposer should include information relating to the dates such services were provided and the types of coverage that proposer placed/serviced for such entity.</p> <p>Points Value: 5</p>	<p>Lee County Port Authority All P&C lines, WC, ancillary programs 2017-current; KIPP Public Charter Schools -Jacksonville All P&C lines 2017-current; Hillsborough County Aviation Authority, Claims Services & Misc. Consulting 2019-current.</p> <p><i>(See proposal submittal for additional information)</i></p>	<p>All of our team members are experienced in dealing with every facet of property and casualty insurance associated which Florida Governmental entities may encounter.</p> <p><i>(See proposal submittal for additional information)</i></p>	<p>In addition to our expansive OCIP and infrastructure expertise, Marsh's Public Entity Practice provides risk consulting and risk transfer solutions to the public sector. Service to more than 500 U.S. Public Entity Clients.</p> <p><i>(See proposal submittal for additional information)</i></p>	<p>A short list of notable Controlled Insurance Programs that we've administered in the Southeast region is provided. The list also includes our Active CIP Projects as well as a notation for Rolling / Master Wrap Up Programs. Our Atlantic / South CIP Experience: Alabama OCIPs, Florida OCIPs, Florida CCIPs, Georgia OCIPs, Louisiana OCIPs, Louisiana CCIPs, North Carolina OCIPs, North Carolina CCIPs, South Carolina OCIPs, Radnor CIPs, Multiple States OCIPs, Multiple States CCIPs.</p> <p><i>(See proposal submittal for additional information)</i></p>
<p>(3) Experience with a Master OCIP</p> <p>Demonstrate proposer's ability to develop, market, implement, and administer a master OCIP, including construction related safety and loss control services, claims administration services, and insurance programs in a public entity environment. Include experience in the development of master OCIPs for construction of public/institutional buildings during the past three (3) years.</p> <p>Points Value: 5</p>	<p>Alliant consistently achieves superior results for our OCIP clients through a combination of our aggressive approach to insurance broking, sound loss controls programs, established claims management, and meticulous administrative program. Below are examples of program savings that our core team provided to the Sacramento Airport Big Build and a recent OCIP placement made for a tribal nation client. We are proud to say that while some clients have incurred significant claim losses, no client has ever experienced a negative overall financial outcome through the use of our programs. OCIP/Full Wrap-up experience from 2013 to current for Judicial Council of California; LAUSD Master</p>	<p>the Gallagher team possesses a wealth of expertise in the placement, management and administration of Master/Rolling OCIP projects across the US, and more specifically, within Broward County. The size and scale of our team affords us access to national resources to help address any unusual situations which may arise as part of this OCIP project. Most importantly for Broward County, the local OCIP management team possesses a wealth of industry experience in the public sector as well as proven performance with effectively assisting the County's in insuring and administering its past</p>	<p>Marsh has extensive experience with large complex Master OCIP programs for both public and commercial clients. Below is a representative list of large rolling programs with similar scope. All of these programs include the implementation of Marsh's Project Risk Service platform which includes placement, wrap-up administration, claims oversight and loss control. All of the projects listed below are current and have work that has been performed in the last 3 years.</p>	<p>A short list of notable Controlled Insurance Programs that we've administered in the Southeast region is provided. The list also includes our Active CIP Projects as well as a notation for Rolling / Master Wrap Up Programs.</p> <p>Our Atlantic / South CIP Experience: Alabama OCIPs, Florida OCIPs, Florida CCIPs, Georgia OCIPs, Louisiana OCIPs, Louisiana CCIPs, North Carolina OCIPs, North Carolina CCIPs, South Carolina OCIPs, Radnor CIPs, Multiple States OCIPs, Multiple States CCIPs.</p>

	<p>Program; Long Beach Unified School District; Los Angeles Community College District; Maryland Stadium Authority (MSA); Port of Oakland; Sacramento Regional County Sanitation District – total OCIP Values of \$13,343,842,298.</p> <p>Sacramento International Airport Big Build, Project Size/Duration: \$800 million over 5 years (2008-2013) Client Need: Ability to maintain additional cash on hand during the recent bond/credit market freeze, Alliant Actions: 1. Negotiated bi-annual premium payments on a pre-established annual payment plan during and for the second year of the policy. 2. Negotiated a reduction in premium and loss fund payments of over \$4.5 million during the second year based upon the excellent project loss history and a reduction in project scope. Overall Program Savings Projected final OCIP budget (full program cost) reduced by 83% from original OCIP budget.</p> <p>Tribal Nation; Oklahoma, Project Size/Duration: \$250 million over 2 years (2013 – 2015), Client Need: Obtain up front savings on project insurance for additional cash flow to the construction budget. <i>(See proposal submittal for additional information)</i></p>	<p>and present OCIPs. Not only has the OCIP team excelled in the placement of coverages but has continually negotiated with the carriers to enhance the benefits being provided to the County including extending the program for a third time. We also significantly reduced the collateral requirements for the Rolling OCIP by \$6.42 million as well negotiating with the carrier to waive \$3.6 million in unearned premiums that were contractually owed by the County at the end of 2014. In 2016, as a direct result of Gallagher's effective service delivery for its Rolling OCIP, Denver extended Gallagher's contract to begin another Rolling OCIP Program. This program included approximately \$225 Million of various airport projects. In 2017, Gallagher began yet another Rolling OCIP for projects scheduled for completion between 2017 and 2022. This OCIP was primarily designed for two different types of projects. This Program included OCIP, Builder's Risk, OPPI, and Pollution coverages. <i>(See proposal submittal for additional information)</i></p>	<p>Hilton grand Vacations: 5/1/2014 to present, TIV/TCV: \$329 million, LOC: 3 GL wrap programs including placement, administration, and claims oversight. Unique Factors: Coastal projects in multiple states, with hotel/condo risk. Bedrock Development / Rock Ventures, 7/17 to present, TIV/TCV: \$2.24 billion, LOC: 2-line wrap including placement, administration, claims oversight, and loss control. Unique Factors: urban congested location, multiple concurrent projects. Northrop Grumman Corporation, 6/29/16 to 12/31/19, TIV/TCV: \$497M, LOC: 2-line wrap including placement, administration, claims oversight, and loss control. Unique Factors: coastal location, military contractor on secure site, multiple small contracts. Encore Capital Management, 12/14/15 to present, TIV/TCV: \$640 million, LOC: 8 GL wrap programs including placement, administration, and claims oversight. Unique Factors: coastal locations, multiple states, residential exposure for completed operations. <i>(See proposal submittal for additional information)</i></p>	<p><i>(See proposal submittal for additional information)</i></p>
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Workload of the Firm – 5 Points Total

<p>List all completed and active projects that proposer has managed within the past five years. In addition, list all projected projects that proposer will be working on in the near future. Projected projects will be defined as a project(s) that proposer has been awarded a contract but the Notice to Proceed has not been issued. Identify any projects that proposer worked on concurrently. Describe proposer's approach in managing these projects. Were there or will there be any challenges for any of the listed projects? If so, describe how proposer dealt or will deal with the projects' challenges.</p>	<p>We methodically track all upcoming projects in order to manage staff work load. Primarily, new projects come from either Owner or Contractor clients who are doing rolling programs or prospective clients with new projects starting in the near future. At the moment, our SE Wrap-Up Team pipeline (that follows) includes \$6.7 billion in forecasted projects over the next six months. As to be expected, prospective projects and clients are extremely sensitive information. Our contractor or owner/developer clients do not permit us to share this information as they do not wish this information to be available to their competitors. <i>(See proposal submittal for additional information)</i></p>	<p>The Gallagher team proposed for this project all have been working together for many years and carry stable, manageable workloads. We recognize that no two organizations are the same and, therefore, no two customers' requirements for service are the same. Our team is keenly aware of the fluid nature of OCIP projects and that is precisely why we utilize a multi-faceted team, ensuring the availability of key team members as may be required in order to effectively respond to any "immediate needs" or "crisis situation. Our service team has made itself available to Broward County on numerous occasions on just a few hours' notice. <i>(See proposal submittal for additional information)</i></p>	<p>Marsh is currently working on 1,004 active projects across the country for 109 program sponsors. This workload is distributed among 43 full-time dedicated wrap-up professionals. Marsh has comprised a team that will meet and exceed expectations. The structure of our approach will facilitate communications so that placement, administration, claims and loss control are in constant communication to address issues as they arise. In addition, we will provide regular reports and have quarterly stewardship reviews with Broward County to go over all aspects of the program. <i>(See proposal submittal for additional information)</i></p>	<p>Willis Towers Watson wants to assure Broward County that we don't foresee our future pipeline having any effect with the level of service or engagement with our proposed offerings and obligations. Please see Page 27, OCIP Administration & Management, for how these projects are managed. To date, Willis Towers Watson has not encountered any challenges that are worth noting for the Wrap Up programs we administer. List of current wrap-up projects can be found starting page 73 of proposer's submittal package. <i>(See proposal submittal for additional information)</i></p>
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