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2013 MAY 16 PM 2:16

AGENDA REPORT

TO: DEANNA J. SANTANA
CITY ADMINISTRATOR

FROM: Jim Reese

SUBJECT: Supplemental Report #2 – Rolling Owner Controlled Insurance Program – RFP and List of Vendors
DATE: May 15, 2013

City Administrator
Approval

Date

5/16/13

COUNCIL DISTRICT: City-wide

RECOMMENDATION

Staff recommends that the Council accept this supplemental report regarding the implementation of a Rolling Owner Controlled Insurance Program.

REASON FOR SUPPLEMENTAL REPORT

At the May 14, 2013 Community and Economic Development Committee Meeting, staff was directed to provide additional information regarding the issuance of a Request for Proposal for Rolling Owner Controlled Insurance Program (ROCIP) Brokerage and Administration Services. Specifically, staff was directed to provide a list of all vendors invited to participate in the RFP process.

Business Name	City	State
All Purpose Insurance	Oakland	CA
Alliant Insurance Services	Newport Beach	CA
Aon Risk Services	San Francisco	CA
Arthur J. Gallagher	San Francisco	CA
Cal State Insurance	Oakland	CA
Dixon Financial & Insurance	Dixon	CA
Gallagher Construction	San Francisco	CA
Holmes Murphy & Associates	Scottsdale	AZ
IOA Insurance	Longwood	CA
Keenan & Associates	Oakland	CA
Lee Insurance	Albany	CA
Marsh Risk & Insurance	San Francisco	CA
Merriwether & Williams	Oakland	CA
PFN Insurance	San Leandro	CA

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Richard Freeman Insurance	Oakland	CA
Turner Surety & Insurance	Woodcliff Lake	CA
Wells Fargo Insurance	New York	NY
Willis of Nevada	Las Vegas	NV

This listing was provided by the City Contract Compliance Department based on their survey of local firms and review of OCIP RFP processes completed by other public agencies in the recent past. **Attachment A** is the email invitation sent to the identified vendors, soliciting their participation in the ROCIP RFP process. In addition to providing invitations to participate to the identified vendors, the City also issued advertisements in four local newspapers, inviting bidders to participate in the OCIP RFP process.

Staff was also asked to attach a copy of the RFP document to the report. Due to the voluminous size of the document, it was agreed that a web-link to the document could be provided in lieu of the actual document. The original RFP document can be found at:

<http://www2.oaklandnet.com/Government/o/CityAdministration/d/CP/s/Construction/index.htm>.

Scroll down to “**REQUEST FOR PROPOSAL ACCESS BY COUNCIL REQUEST ONLY**” to view the RFP. Note that this site will not be updated with addendums or question responses to the RFP as these items are contained in the secure iSupplier website.

For questions regarding this report, please contact Deborah Grant, Risk Manager, at (510) 238-7165

Respectfully submitted,



Jim Reese
Interim Director, HR/IT

Prepared by:
Deborah Grant, Risk Manager
DHRM – Risk & Benefits Unit

Attachment

A – Email Invitation to RFQ#4563 – RFP for Rolling Owner Controlled Insurance Program Brokerage and Administration Services

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ATTACHMENT A

Grant, Deborah (Cornwell)

From: Peav, Paula
Sent: Friday, May 03, 2013 10:17 AM
To: ivanvioldt@alliant.com; ingrid@imwis.com; SiR@ratecrushers.com; Narshi@alliantinsurance.com; rgriffin@alliantinsurance.com; jacstle@alliantinsurance.com; crag.bowlus@aon.com; greg_magda@ars.aon.com; diana_beaty@ajg.com; scott_whiteside@ajg.com; pdbritto_calstate@sbcglobalnet.com; donny@dixonfinserve.com; brian_cooper@ajg.com; kaldrich@holmesmurphy.com; jeff.mann@ioausa.com; Kristin.Usery@ioausa.com; jhill@keen.com; sklee@leeins.com; TaneR.Abbott@marsh.com; ingrid@imwis.com; npenland@pfninsurance.com; richman3410@sbcglobal.net; gpine@tsibinc.com; david.obrien@wellsfargo.com; perry.vandenberg@willis.com
Cc: Inman, Vivian; Grant, Deborah (Cornwell)
Subject: RFQ #4563 -RFP for Rolling Owner Controlled Insurance Program Brokerage and Administration Services

My Name is Paula Peav, and I am sending you this email from the Office of the City Administrator, Contracts and Compliance Division with the City of Oakland.

Your company's name has been given to our department to participate in the upcoming RFQ #4563- RFP Rolling Owner Controlled Insurance Program Brokerage and Administration Services. One of my responsibilities in this process is to assist your firm with our iSupplier process to receive an invitation to participate.

The release date will be Saturday, May 4, 2013 and proposals are due Tuesday, May 28, 2013.

The City has implemented a system called iSupplier where firms can download the RFP/RFQ documents for free. This would include Addenda, planholders list etc. and if a contractor is awarded this project your contract and invoicing will also be included in iSupplier. Therefore, please take the time to register for upcoming projects if you haven't already done so.

If your firm has already registered, notification will be sent to the contact person that is listed in your contacts folder of your portal. Please log into the iSupplier website using this user name and your password. If you have forgotten the password, please send an email to isupplier@oaklandnet.com. If you did not automatically receive notification, refer to number 7 of the user guide at <http://www2.oaklandnet.com/oakca1/eroups/contracting/documents/webcontent/dowd021639.pdf>.

Instructions on How to Register for iSupplier:

Suppliers who have already had contracts with the City but have not yet been invited by iSupplier to update their Business Profile: Your firms project manager or principal should send an email to isupplier@oaklandnet.com and provide the email address you wish to use as your business primary point of contact (do not use temporary email addresses) with contact information such as name, telephone number, etc.

Suppliers who do not have previous contracts with the City should register <http://www2.oaklandnet.com/Government/o/CityAdministration/d/CP/index.htm>. Click on the "Register" under the iSupplier logo. The City will review your application/invitation within 2 working days with an email approving or rejecting your firms' registration application.

Once you have registered your user name (email address) and password, please log into the system via the internet and not the link in the email and click the Admin tab at the top right to complete your Business Products and Services. By completing this link will ensure that you receive notifications of all City projects within your classification.

Once the Business Products and Services link has been completed, please send an email to DCPCA@OAKLANDNET.COM to notify us that you have completed your registration and that you would like to be invited to view the RFQ.

If you encounter any problems during your registration process, please send an email to isupplier@oaklandnet.com.

Our offices will be closed on **Monday, May 27, 2013** for Memorial Day Holiday. We will reopen Tuesday, **May 28, 2103**.

Paula Peav
Administrative Analyst II
City of Oakland
Office of the City Administrator
Contracts and Compliance Division
(formerly The Department of Contracting and Purchasing, Contract Administration Division)
250 Frank H. Ogawa Plaza, Suite 3341
Oakland, CA 94612

Main 510.238.3621
Fax 510.238.6267
Phone 510.238.3190
Email: ppeav@oaklandnet.com

For iSupplier Registration and Login visit us
at: <http://www2.oaklandnet.com/Government/o/CityAdministration/d/CP/index.htm>

For Contracting Opportunities visit us at:
<http://www2.oaklandnet.com/Government/o/CityAdministration/d/CP/s/Construction/index.htm>

For Public Works Agency contracts, please contact Calvin Hao at 510.238.7395 or chao@oaklandnet.com or Tamala Barnes at 510.238.7252 or tbarnes@oaklandnet.com

For iSupplier planholders List
<http://www2.oaklandnet.com/Government/o/CityAdministration/d/CP/s/PlanHoldersList/index.htm>

For Construction/Professional Service/DBE Contract and Bid Packet Schedules/Forms
<http://www2.oaklandnet.com/Government/o/CityAdministration/d/CP/s/FormsSchedules/Index.htm>

