

The Department of Procurement (the “DOP”)  
on behalf of the  
*Department of Finance*

# FC-8100, Insurance Brokerage and Consulting Services



**Presentation Made By: Krista A. Morrison, Esq., Contracting Officer**

Tuesday April 7, 2015

Location: DOP Conference Room, Suite 1900

Time: 11:00 am

# FC-8100, Insurance Brokerage and Consulting Services



- ▶ **Welcome and Introductions**
  - Krista A. Morrison, Esq., Contracting Officer
  
- ▶ **Ethics Department**
  - Ms. Nina Hickson, Ethics Officer
  
- ▶ **Enterprise Risk Management**
  - Mr. Jimmy Porter, Risk Management Analyst
  
- ▶ **Office of Contract Compliance**
  - Mr. Bruce Bell, Senior Contract Compliance Manager
  
- ▶ **User Department: Department of Finance**
  - Ms. Alison Knight, Interim Director for Enterprise Risk Management
  - Ms. Catrina Gilbert, Risk Manager
  - Ms. Kathy Lloyd, Risk Manager
  
- ▶ **Closing: Department of Procurement**
  - Krista A. Morrison, Esq., Contracting Officer



# Be Mindful of...

- **Prohibited Contacts**
- **Non-Authoritative Statements**
- **Plan Holders vs. Attendees at Pre-Conference**
- **Last Date for Addendum Questions:**
  - **Friday, April 10, 2015, 1:00 p.m. (eastern)**
- **Proposal Due Date:**
  - **Wednesday, May 13, 2015, 2:00 p.m. (eastern)**
- **Oral Interview Sessions (*at City's discretion*):**
  - **May 20-21, 2015**



# Minimum Qualifications

- Must be licensed by the State of Georgia for all required lines of coverage for a minimum of ten (10) years;
- Must not have had any license or certification revoked in Georgia or any other state;
- Must possess a minimum of 5 years' experience in the placement of government insurance with at least two (2) consecutive years of working with a municipality with services similar to the City of Atlanta;
- Must possess a minimum of 5 years' experience in the administration of an owner controlled insurance program; and
- Must be able to place business with all of the City's existing providers.



# City of Atlanta Ethics Office

**Ms. Nina Hickson**  
Ethics Officer



# Office of Enterprise Risk Management

**Mr. Jimmy Porter**  
Risk Management Analyst



# Office of Contract Compliance

**Mr. Bruce Bell**  
Senior Contract Compliance Manager

# Department of Finance



## ▶ Introduction of Department's Business Objectives

- Ms. Alison Knight, *Interim Director for Enterprise Risk Management*
- Ms. Catrina Gilbert, *Risk Manager*
- Ms. Kathy Lloyd, *Risk Manager*

## ▶ Opening the Floor for Questions & Answers

- **(Statements Made in this Forum Today are Not Authoritative)**

*All questions and responses provided are not considered authoritative until placed in writing to the appropriate point of contact within DOP, Krista A. Morrison, Esq., Contracting Officer. She will ensure that a subsequent addendum is issued to all Plan Holders of record.*

# Contents of Proposals



- ▶ **Proposals should be inclusive of :**

## **I. Informational Proposal**

- ▶ **Volume I - Information drafted by Proponent**

- Executive Summary
- Organizational Structure
- Resumes of Key Personnel
- Overall Experience
- Management Plan

- ▶ **Volume II - Required Submittal Forms (Forms 1-9)**

- Include Responses to Supplemental Question Form in Appendix E

**Proponents must submit one (1) stamped “original” and ten (10) copies.**

## **II. Cost Proposal - Exhibit A.1**

**Proponents must submit one (1) stamped “original” and ten (10) copies in a separate sealed envelope.**

# Next Anticipated Procurement Steps – After Proposal Due Date



- ▶ **Step 1: DOP Will Review Proposal(s) for Responsiveness (within two business days)**
  - Form 1 - Illegal Immigration Reform and Enforcement Act Forms (**IIREA**)
  - Form 2 - Disclosure Form and Questionnaire
  - Form 3 - Proponent Financial Disclosure
  - Form 4.1 - Certification of Insurance Ability
  - Form 4.2 - Certification of Bonding Ability (**not applicable**)
  - Form 5 - Acknowledgement of Addenda
  - Form 6 - Proponent Contact Directory
  - Form 7 - Reference List
  - Form 8 - Proposal Bond (**not applicable**)
  - Form 9 - Required Submittal Checklist
  - Appendix A - Office of Contract Compliance Forms
  - Appendix E - Responses to Supplemental Question Form
  
- ▶ **Step 2: DOP Will Submit **ONLY** Responsive Proposals to Internal City Stakeholders to Review for Responsibility:**
  - ✓ **Office of Contract Compliance** to Review Appendix A Submittals
  - ✓ **Office of Enterprise Risk Management** to Review Proponents' Financial Disclosure Statements
  - ✓ **Department of Finance** to Review for responsibility, and *assessment of a need* for Oral Interviews and Subsequent Scheduling of Collaborative Evaluation Session(s)

# Reminders

▶ **Addendum Deadline:**

○ **Friday, April 10, 2015, 1:00 p.m. (eastern)**

**\*\*QUESTIONS RECEIVED THEREAFTER MAY NOT BE CONSIDERED\*\***

▶ **Proposal Due Date:**

○ **Wednesday, May 13, 2015, 2:00 p.m. (eastern)**

**\*\*ABSOLUTELY NO PROPOSALS WILL BE ACCEPTED AFTER 2:00 P.M.\*\***



**Primary Point of Contact: Krista A. Morrison, Esq., Contracting Officer**

**Email: kamorrison@atlantaga.gov**

**Direct Phone Number: 404-865-8709**