



Insurance Consultant Services, Proposal #PUR0615-247

Proposal Evaluation Summary, May 4, 2016

Evaluators: Yvonne Aubrey, Casey Drew, Don Swanson, Steve Estenson and Phil Brooks

Proposals received:

Firm Name	Location
Arthur Gallagher Risk Management	West Des Moines, IA
Aon Risk Services Central, Inc.	West Des Moines, IA
Holmes Murphy & Associates	Cedar Rapids, IA
Millhiser Smith Agency, Inc.	Cedar Rapids, IA
Stamy Agency, Inc.	Cedar Rapids, IA
TrueNorth Companies, LC	Cedar Rapids, IA
Well Fargo Insurance Services	St. Louis Park, MN

Top ranked four firms:

1. TrueNorth Companies, LC

Criteria	Points
Qualifications and Experience	500
Proposed Cost (See Page 2)	140
Responsiveness	300
Local Preference Points	50
Total Evaluation Points	990

Facts:

- Comprehensive implementation process and timeline
- Presented a proactive focused systematic approach to the project
- Dedicated Client Service Team of 13 professionals with extensive experience
- Fee includes a Risk Management Information System (RMIS) that the City values at \$75,000
- Outcome demonstrated with Mercy Hospital after flood

2. Holmes Murphy & Associates

Criteria	Points
Qualifications and Experience	400
Proposed Cost (See Page 2)	200
Responsiveness	240
Local Preference Points	50
Total Evaluation Points	890

Facts:

- Many public sector clients including Urbandale and Muscatine
- Included sample report documents
- Methodology was not as strong in comparison to other proposals
- Team of 6 professionals assigned to the project

3. Millhiser Smith Agency, Inc.

Criteria	Points
Qualifications and Experience	300
Proposed Cost (See Page 2)	160
Responsiveness	270
Local Preference Points	50
Total Evaluation Points	780

Facts:

- Submitted a comprehensive proposal
- Detailed systematic method for risk assessment
- Public Sector Experience with Linn County and City of Robins
- Team of 4 professionals assigned to the project

4. Stamy Agency, Inc.

Criteria	Points
Qualifications and Experience	250
Proposed Cost (See Page 2)	180
Responsiveness	210
Local Preference Points	50
Total Evaluation Points	690

Facts:

- Public Sector experience with City of Des Moines and Polk County
- Team of 2 professionals assigned to the project

Recommendation for Award:

The evaluation team scored the top ranked four proposals and TrueNorth was rated as the top proposal. A resolution will presented to the City Council on June 14, 2016 recommending that the contract be awarded to TrueNorth.

Financial Submittals:

Firm Name	Risk Management Services	Insurance Placement and Management	5 Year Total
Arthur Gallagher Risk Management	105,000	520,000	625,000
Aon Risk Services Central, Inc.	250,000	500,000	750,000
Holmes Murphy & Associates	362,500	Included	362,500
Millhiser Smith Agency, Inc.	62,185	422,026	484,211
Stamy Agency, Inc.	412,000	Included	412,000
TrueNorth Companies, LC	375,000	200,000	575,000
Well Fargo Insurance Services	125,000	240,000	365,000