

**REPORT/RECOMMENDATION TO THE BOARD OF SUPERVISORS  
OF SAN BERNARDINO COUNTY  
AND RECORD OF ACTION**

**November 16, 2021**

**FROM**

**VICTOR TORDESILLAS, Director, Department of Risk Management**

**SUBJECT**

Contracts for Insurance Broker Services to Support County Insurance Programs

**RECOMMENDATION(S)**

Approve fee-for-service contracts with the following insurance brokerage firms, in the estimated aggregate cost of \$4,000,000, to market, place, and service County Insurance Programs for the period of December 11, 2021 through December 10, 2026.

1. Alliant Insurance Services, Inc., **Contract No. 21-875.**
2. Arthur J. Gallagher & Co. Insurance Brokers of California, Inc., **Contract No. 21-876.**
3. James + Gable Insurance Brokers, Inc., **Contract No. 21-877.**
4. Willis Towers Watson West Insurance Services, Inc., **Contract No. 21-878.**

(Presenter: Victor Tordesillas, Director, 386-8621)

**COUNTY AND CHIEF EXECUTIVE OFFICER GOALS & OBJECTIVES**

**Operate in a Fiscally-Responsible and Business-Like Manner.**

**FINANCIAL IMPACT**

Approval of this item will not result in the use of additional Discretionary General Funding (Net County Cost) as these services will be paid from various Department of Risk Management (DRM) internal service funds, which are financed by County departments and Special Districts via internal service rates approved annually by the Board of Supervisors. The estimated combined five-year cost for these services is approximately \$4,000,000. This estimate is based on broker commissions of 10% of total premiums paid for all policies procured for the County. This cost is included in the DRM 2021-22 budget and will be included in future recommended budgets.

**BACKGROUND INFORMATION**

The four new contracts will establish services with insurance brokerage firms, which will serve as insurance consultants for the County. The insurance brokers will be responsible for conducting a thorough analysis of all current insurance programs to identify coverage overlaps and/or coverage deficiencies, and to compare and evaluate current programs against available insurance markets to determine if the current placements are the most cost effective alternatives. The insurance brokers will also evaluate the cost effectiveness of increasing or decreasing the self-insurance retentions and/or coverage limits.

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**PROCUREMENT**

On June 1, 2021, Request for Proposal (RFP) RMG121-RMADM-4216 for Insurance Broker Services was released on the County's Electronic Procurement Network (ePro). The following five brokers submitted proposals:

Insurance Broker Name	Location
Alliant Insurance Services, Inc.	Newport Beach, CA
Arthur J. Gallagher & Co. Insurance Brokers of California, Inc.	Irvine, CA
James + Gable Insurance Brokers, Inc.	Manhattan Beach, CA
Willis Towers Watson West Insurance Services, Inc.	Irvine, CA
USI Insurance Services LLC	Woodland Hills, CA

Staff from the DRM and County Counsel (the evaluation committee) evaluated the proposals for completeness, compliance with RFP requirements, experience, expertise in insurance brokerage services, and strength in specialties needed to serve the County. The evaluation committee recommends awarding contracts to the top four brokers. No protests were received.

**REVIEW BY OTHERS**

This item has been reviewed by County Counsel (Cynthia O'Neill, Principal Assistant County Counsel, 387-5455) on September 27, 2021; Purchasing Department (Bruce Cole, Supervising Buyer, 387-2148) on October 5, 2021; Human Resources (Diane Rundles, Human Resources Director, 387-5572) on October 21, 2021; Finance (Sofia Almeida, Administrative Analyst, 387-4378) on October 25, 2021; and County Finance and Administration (Paloma Hernandez-Barker, Deputy Executive Officer, 387-5426) on October 29, 2021.

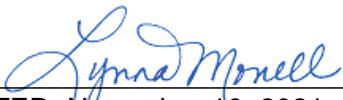
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Record of Action of the Board of Supervisors  
San Bernardino County

**APPROVED (CONSENT CALENDAR)**

Moved: Joe Baca, Jr. Seconded: Dawn Rowe  
Ayes: Col. Paul Cook (Ret.), Janice Rutherford, Dawn Rowe, Curt Hagman, Joe Baca, Jr.

Lynna Monell, CLERK OF THE BOARD

BY   
DATED: November 16, 2021



cc: Risk - Tordesillas w/agrees  
Contractor - C/O Risk w/agree  
File - w/agree  
CCM 11/23/2021