

TABULATION SHEET

Bid No. 2015-031-6485 Annual Contract for Various Types of Insurance Coverage

Opening Date: 19-Mar-2015

Buyer: Gloria Mcculloch 214.653.7433

Effective: March 31, 2015 thru March 30, 2016 w/two extension options

NCTRCA Certified

Certified by other Agencies

EE01 Completed

Please indicate to Dallas County whether the principal company owner is a:

Please indicate whether the business principal office or headquarter is physically located within Dallas County

How were you notified?

Addendum(s) Returned (if applicable)

Description of Coverage and Limits

Section 1: Name of Insured: Dallas County

Department/Division: Tax Office - Tax Assessor/Collector

Entity Type: Government Entity

Tax ID: 75-6000905

Coverage Effective Date/Period: April 01, 2015

Policy Type: Commercial Crime Policy

Coverage Type, Policy Limits, and Deductibles:

1 – Blanket – Employee Theft, Limit of Insurance : \$10,000,000, Deductible Amount: \$50,000

2 – Forgery or Alteration, Limit of Insurance : \$1,000,000, Deductible Amount: \$5,000

3 – Inside The Premises – Theft, of Money & Securities: Blanket, Limit of Insurance : \$1,000,000 , Deductible Amount: \$5,000

4 – Inside The Premises Robbery or Safe Burglary of Other Property: Blanket, Limit of Insurance : \$1,000,000 , Deductible Amount: \$5,000

5 – Outside The Premises, Theft of Money & Securities and Robbery of Other Property: Blanket, Limit of Insurance :\$1,000,000, Deductible Amount: \$5,000

6 – Computer Fraud, Limit of Insurance : \$10,000,000, Deductible Amount: \$50,000

7 – Funds Transfer Fraud, Limit of Insurance : \$10,000,000, Deductible Amount: \$50,000

8 – Money Orders and Counterfeit Paper Currency - Not Covered

9 – Other Coverages/ Endorsements: Faithful Performance: \$1,000,000, Deductible Amount: \$5,000

Guarantee Rate: Yes – one (1) year, subject only to changes in coverage types and limits

Name of Agent/Broker Agency Name

VENDOR #1

ARTHUR J. GALLAGHER RISK MANAGEMENT SERVICES, INC.
Barbara Murray, Assistant Vice President
5420 LBJ Freeway, Suite 400
Dallas, TX 75240
972-663-6127
Fax: 972-663-6043
www.ajg.com

No
No
Yes
Other County: Chicago County

Dallas County website
No

Arthur J. Gallagher Risk Management Services, Inc.

VENDOR #2

McGRIFF, SEIBELS & WILLIAMS OF TEXAS, INC.
Johnny Fontenot, Executive VP
5080 Spectrum Drive, Suite 900E
Addison, TX 75001
469-232-2100
Fax: 469-232-2101
www.mcgriff.com

No
No
Yes
Dallas County taxpayer

Yes

McGriff, Seibels & Williams of Texas, Inc
Page 1 of 8

VENDOR #3

TEXAS ASSOCIATION OF COUNTIES

RICK MANAGEMENT POOL
Tracy L. Seiler, Director Risk Mgmt Srvc
1210 San Antonio
Austin, TX 78621
512-478-8753

www.county.org

No
No
Yes

Letter from Purchasing
No

NO BID

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Location of Agent/Broker Agency:

Underwriter/Carrier Name

Underwriter/Carrier A.M. Best or BCAR Rating/Score

Annual Premium

Are installment payment options available?

Three (3) Year in Equal Annual Installments

Service Fee per Installment

Optional: 2nd Year Extension Option: Annual Premium:

Optional: 3rd Year Extension Option: Annual Premium:

Note: Please be certain to itemize all caveats relating to the 2nd and 3rd year extension option annual premium rate guarantees indicated above

Please specify any and all other additional fees or charges (if any) not included in annual premium cost

Broker Fees, Agent Fees, and/or Commission (if any)

Administration Fees (if any)

Claims Handling Fees (if any)

Others - Specify Type and Rate Below (if any)

List all endorsements included in annual premium cost:

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972-663-6127
Fax: 972-663-6043
www.ajg.com

5429 LBJ Freeway, Suite 400, Dallas, TX 75240

Hal Miller/Zurick American Insurance Co.
A+XV

13,143.00

No

N/A

N/A

N/A

N/A

Included in premium

N/A

N/A

N/A

N/A
NOTE: Premium quote above reflects requested limits but NOT deductibles. Our quote reflects the following deductibles: \$100,000 deductible each for Blanket Employee Theft, Computer Fraud and Funds Transfer Fraud; \$10,000 Deductible Each for forgery or alteration, Inside the Premises - Theft of money, Inside the Premise - Robbery, Outside the Premise and Other Coverages

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Addison, TX 75001
469-232-2100
Fax: 469-232-2101
www.mcgriff.com

5080 Spectrum Drive, Suite 900E, Addison, TX 75001
Massachusetts Bay Insurance Company
A XV

Option 1: \$41,032.00
Option 1: \$100,000 and \$10,000 deductible

Option 2: \$54,247.00
Option 2: \$50,000 and \$10,000 deductible

No
Option 1: \$41,032.00 and Option 2: \$54,247.00*

0

Option 1: \$41,032.00 and Option 2: \$54,247.00*

Option 1: \$41,032.00 and Option 2: \$54,247.00*

\$5,424.70

0

0

0

Please review the quote
*This is for Option pricing for the \$50,000 deductible/\$10,000 deductible per quote. Option 1 pricing is \$41,032.00 annually for a 3 year policy term for \$100,000/\$10,000 deductible per quote. Note deductibles are not the same as requested in the RFP submission.

VENDOR #3

TEXAS ASSOCIATION OF COUNTIES

RICK MANAGEMENT POOL
Tracy L. Seiler, Director Risk Mgmt Srvc
1210 San Antonio
Austin, TX 78621
512-478-8753

www.county.org

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Effective: March 31, 2015 thru March 30, 2016 w/two extension options

Section 2

Name of Insured: Dallas County

Department/Division: Sheriff Department – Courtesy Patrol

Entity Type: Government Entity

Tax ID: 75-6000905

Coverage Effective Date/Period: May 11, 2015

Policy Type: Auto Liability and General Liability Coverage

Schedule of Vehicles: See List

Coverage Type, Policy Limits, and Deductibles:

Part 1: Auto Liability Coverage Requirements

Bodily Injury \$100,000/per person/\$300,000/per occurrence

Property Damage \$100,000/per occurrence

Personal Injury Protection \$5,000/per person

Deductible: \$0.00

Uninsured/Underinsured Motorists

Bodily Injury \$100,000/per person/\$300,000/per occurrence

Property Damage \$100,000/per occurrence

Deductible: \$250.00

Addition Endorsements Required: Non-Owned and Hired Vehicle Coverage, Supplementary Death Benefits and Limited Mexico Coverage

Part 2: General Liability Coverage Requirements

Bodily Injury \$100,000/per person/\$300,000/per occurrence

Property Damage \$100,000/per occurrence

Damage to Premises Rented to the Named Insured: \$50,000

Personal and Advertising Injury Liability: \$100,000/per person,

\$300,000/per offense/aggregate

Employee Benefits Liability: \$100,000

Medical Payment: \$5,000/per person

Addition Endorsements Required

Excess Liability Coverage \$1,000,000/per person/occurrence

\$1,000,000/aggregate

Deductible: \$0.00

Guarantee Rate: Yes – one (1) year

Name of Agent/Broker Agency Name

Location of Agent/Broker Agency:

Underwriter/Carrier Name

Underwriter/Carrier A.M. Best or BCAR Rating/Score

Annual Premium

Are installment payment options available?

VENDOR #1

ARTHUR J. GALLAGHER RISK

MANAGEMENT SERVICES, INC.

Barbara Murray, Assistant Vice President

5420 LBJ Freeway, Suite 400

Dallas, TX 75240

972-663-6127

Fax: 972-663-6043

www.ajg.com

NO BID

VENDOR #2

McGRIFF, SEIBELS & WILLIAMS

OF TEXAS, INC.

Johnny Fontenot, Executive VP

5080 Spectrum Drive, Suite 900E

Addison, TX 75001

469-232-2100

Fax: 469-232-2101

www.mcgriff.com

McGriff, Seibels & Williams of Texas, Inc.

5080 Spectrum Drive, Suite 900E, Addison, TX 75001

No Quote submitted for Auto Liability and General Liability

VENDOR #3

TEXAS ASSOCIATION OF COUNTIES

RICK MANAGEMENT POOL

Tracy L. Seiler, Director Risk Mgmt Srvc

1210 San Antonio

Austin, TX 78621

512-478-8753

www.county.org

Texas Association of Counties Risk Management Pool
Austin TX 78701

Texas Association of Counties Risk Management Pool
Not applicable we are a Risk Pool and not an Insurance Company

10,838 (\$100/\$300/\$100 limit)
or 13,365 (\$1M combined single limit)
Yes, upon request

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Three (3) Year in Equal Annual Installments
Service Fee per Installment

Optional: 2nd Year Extension Option: Annual Premium:

Optional: 3rd Year Extension Option: Annual Premium:

Note: Please be certain to itemize all caveats relating to the 2nd and 3rd year extension option annual premium rate guarantees indicated above

Please specify any and all other additional fees or charges (if any) not included in annual premium cost

Broker Fees, Agent Fees, and/or Commission (if any)
Administration Fees (if any)
Claims Handling Fees (if any)
Others - Specify Type and Rate Below (if any)

List all endorsements included in annual premium cost:

Section 3

Name of Insured: Dallas County

Department/Division: Health and Human Services – Weatherization Assistance Program

Entity Type: Government Entity

Tax ID: 75-6000905

Coverage Effective Date/Period: April 01, 2015

Policy Type: Contractor’s Pollution Liability (POL)

VENDOR #1

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Barbara Murray, Assistant Vice President
5420 LBJ Freeway, Suite 400
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VENDOR #3

TEXAS ASSOCIATION OF COUNTIES
RICK MANAGEMENT POOL
Tracy L. Seiler, Director Risk Mgmt Srvc
1210 San Antonio
Austin, TX 78621
512-478-8753
www.county.org

Not applicable
Not applicable

Not applicable

Not applicable

Not Applicable
Not Applicable
Not Applicable
Not Applicable

Uninsured/Underinsured Motorist,
Supplemental Death Benefit, Limited Mexico,
Hired and Non-Owned

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Coverage Type: Contractor's Pollution Liability (CPL) to include Mold, Transportation, Testing (Incidental) and Disposal Site Lead Testing – No Coverage

Note: The Pollution Occurrence Insurance shall protect Dallas County Weatherization Assistance Program Operations agency against claims from a property owner, tenant, or neighbor who became sick because they were exposed to a pollutant such as lead, asbestos, radon, or mold, or other pollutants as a result of the County's activities.

Covered Activities: Weatherization Assistance Program Operations

Estimated Weatherization Revenue: \$2,684,583

Limits: \$1,000,000 Each Occurrence – Claims Made
\$1,000,000 Aggregate

Self – Insured Retention: \$2,500 Each Claim (PL)

Additional Endorsements Required

Named Insured Endorsement (Optional)

Insured Endorsement (Blanket)

Guarantee Rate: Yes – one (1) year

5 Year Loss History: None

Prior/Previous Year Underwriter: Lloyds of London A 15

Name of Agent/Broker Agency Name

Location of Agent/Broker Agency:

Underwriter/Carrier Name

Underwriter/Carrier A.M. Best or BCAR Rating/Score

Annual Premium

Are installment payment options available?

Three (3) Year in Equal Annual Installments

Service Fee per Installment

Optional: 2nd Year Extension Option: Annual Premium:

Optional: 3rd Year Extension Option: Annual Premium:

Note: Please be certain to itemize all caveats relating to the 2nd and 3rd year extension option annual premium rate guarantees indicated above

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NO BID

VENDOR #2

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Addison, TX 75001
469-232-2100
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www.mcgriff.com

McGriff, Seibels & Williams of Texas, Inc.
5080 Spectrum Drive, Suite 900E, Addison, TX
75001
Evanston Insurance Company
A XIV

6,118.35

No

N/A

N/A

Not quoted

Not quoted

VENDOR #3

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- Broker Fees, Agent Fees, and/or Commission (if any)
- Administration Fees (if any)
- Claims Handling Fees (if any)
- Others - Specify Type and Rate Below (if any)

List all endorsements included in annual premium cost:

Please answer the questions listed below:

Did your company check Dallas County website (<http://www.dallascounty.org/department/purchasing/currentbids.html>) for any addendums, updates, and/or changes to the solicitation?

Cancellation Provisions:

Should Dallas County desire to cancel the contract, will the premiums be adjusted?

If yes, on what basis?

Claim Administration Services:

Name of Firm:

Physical location of claim office and telephone number:

Is there 24 hour claim service?

What are the claim office's performance standards for financial claim accuracy? Procedural claim accuracy? and Turnaround Time?

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VENDOR #3

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 Tracy L. Seiler, Director Risk Mgmt Srvc
 1210 San Antonio
 Austin, TX 78621
 512-478-8753
www.county.org

558.20

Please quote

No

Yes

Yes

Yes

Yes

Yes

Pro rata

Pro-Rata for the Crime

If Dallas County provides a 30 day written notice, contributions are short rated.

N/A

The carrier has their own claims departments. As per our quote our claims staff is available to help file claims and provide claims assistance

Texas Association of Counties Risk Management Pool

1210 San Antonio, Austin, TX 78701 855-472-5246

Yes

Every claim is assigned by the Claims Manager. Additionally the claims manager reviews every claim file at periodic points within the life of a claim to ensure claim accuracy. The claim adjusting staff commences investigation of every claim assignment within 24 hours from receipt of a claim. Customer service expectations are high and files are reviewed by the Claims Manager to ensure expectations are met. Every file is on a diary with documented plans of action to resolve outstanding claim issues in an effort to produce good claim outcome and resolution of the file.

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Provide claim reporting guidelines, as well as samples of all claims reporting forms and instructions with bid proposal

If a charge for administration is included, please indicate exactly the duties to be performed and provide specimen agreement.

Does the underwriter/carrier offer annual dividend payments?

If yes, please describe the criteria for qualifying annual dividend payments:

Specify any additional comments/cost/etc. included with your bid proposal, if applicable:

Should your firm be awarded this contract, describe what (if any) portion of the bid requirements will be subcontracted out:

Specify Prompt/Early Payment Discount Terms (if any):

Specify the name, telephone number and email address of the account representative who will be handling and managing this account: Note: It is the responsibility of the awarded bidder to notify Dallas County of any account representative and/or contact person changes

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 Barbara Murray, Assistant Vice President
 5420 LBJ Freeway, Suite 400
 Dallas, TX 75240
 972-663-6127
 Fax: 972-663-6043
www.ajg.com

N/A

No

N/A

None

0%

Barbara Murray 972-663-6127
Barbara_murray@ajg.com

VENDOR #2

McGRIFF, SEIBELS & WILLIAMS OF TEXAS, INC.
 Johnny Fontenot, Executive VP
 5080 Spectrum Drive, Suite 900E
 Addison, TX 75001
 469-232-2100
 Fax: 469-232-2101
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No

We will partner with our Trinity Review Services to help gather underwriting information and attend meetings with the County

Johnny Fontenot 469-232-2100
jfontenot@mcgriff.com

VENDOR #3

TEXAS ASSOCIATION OF COUNTIES RICK MANAGEMENT POOL
 Tracy L. Seiler, Director Risk Mgmt Srvc
 1210 San Antonio
 Austin, TX 78621
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All claims files are on a 30 day reporting timeframe to include aggressive plans of action to resolve all outstanding claim issues. Sample claims reporting forms are included.

Exceptions: We are not providing a quote for crime coverage for the Tax Assessor/Collector or for Contractor's Pollution Liability for the HHS Weatherization Program. This contract for Dallas County Sheriff Courtesy Patrol may be extended for two additional one year periods. Auto Liability - We are offering two Limits of Liability options: Option 1 \$100,000/300,000/100,000. Option 2 \$100,000 combined single limit with a \$1,000,000 aggregate limit. General Liability - We are offering two limits of liability options: Option 1 \$100,000 / \$300,000 / \$100,000. Option 2 \$1,000,000 combined single limit with a \$1,000,000 aggregate limit

We do not use subcontractors

None

Kathie Lopez 800-456-5974
kathiel@county.org

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Does your firm/company have the required insurance coverage stated under SECTION 3 - INSURANCE REQUIREMENTS and agree to comply with these requirements during the duration of this contract?

If No, will your firm be able to acquire the required coverage within ten (10) days upon notification of contract award?

Information on Provision of Health Insurance Coverage for Employees

Dallas County may consider the provision of health insurance coverage for employees in the bid evaluation process (see page 5, paragraph 5). Please complete the information below to assist in this evaluation.

a) Does your company provide health insurance coverage to its employees?

b) If your company does provide health insurance coverage to its employees, does the company share in the cost a minimum of:

95% for employee only coverage?

85% for employee + children coverage?

73% for employee + spouse

71% for employee + family coverage?

c) If your company provides health insurance coverage to its employees, is the coverage comparable to the services provided by Dallas County as described in the attached summary plan description? (See Attachment A)

d) If your company plans to utilize subcontractors in the fulfillment of this bid, does each of the subcontractors provide health insurance coverage to their employees that compares to Dallas County's health insurance coverage and share in the cost?

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Fax: 972-663-6043
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Yes

Yes

No

No

No

Yes

Yes

N/A

VENDOR #2

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Yes

Yes

Yes

Yes

No

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Yes

Yes

Yes

Yes

Yes

Yes

Yes

Not applicable