

**Columbus Consolidated Government
Council Meeting Agenda Item**

TO:	Mayor and Councilors
AGENDA SUBJECT:	Brokers for General Insurance Placement (Annual Contract) – RFP No. 21-0033
INITIATED BY:	Finance Department

It is requested that Council authorize the execution of annual contract with Yates Insurance Agency, Inc. dba Yates, Woolfolk & Turner (Columbus, GA) for general insurance placement. The Human Resources Department/Risk Management will procure the services on an as-needed basis. The recommended vendor’s cost proposal is within budget.

Yates, Woolfolk & Turner will obtain quotes and place general insurance including, but not limited to, Property & Casualty insurance for all City facilities, Crime insurance and Cyber insurance.

The term of the contract will be for two (2) years with the option to renew for three (3) additional twelve-month periods. Contract renewal will be contingent upon the mutual agreement of the City and the Contractor.

Annual Contract History:

The previous 5-year contract was awarded to Yates Insurance Agency, Inc. dba Yates, Woolfolk & Turner on April 12, 2016, per Resolution No. 106-16.

RFP Advertisement and Receipt of Proposals:

RFP specifications were posted on the web page of the Purchasing Division, the Georgia Procurement Registry and DemandStar on April 20, 2021. This RFP has been advertised, opened, and evaluated. Two (2) proposals were received on May 14, 2021, from the following:

Yates Insurance Agency, Inc. dba Yates, Woolfolk & Turner (Columbus, GA)
Marsh and McLennan Agency (Columbus, GA)

The following events took place after receipt of the proposals.

RFP MEETINGS/EVENTS		
Description	Date	Agenda/Action
Pre-Evaluation Meeting	05/21/21	The Purchasing Manager advised evaluation committee members of the RFP rules and process, and the using department representative provided an overview. Proposals were emailed to each committee member to review.

1 st Evaluation Meeting	06/09/21	The Evaluation Committee discussed each proposal and determined clarifications were required from one of the responding firms.
Clarification Request #1	06/15/21	Clarification was requested from the one firm.
Clarification Response #1	06/21/21	The clarification response was forwarded to the committee.
Clarification Response #2	06/25/21	Additional clarification was requested from both firms.
Clarification Response #2	06/28/21	Clarification responses were forwarded to the committee.
Additional Information	06/28/21	Based on the responses to Clarification Request #2, additional information was provided to both firms.
Additional Information Response	06/28/21	Both firms indicated their concurrence with the additional information; the concurrence responses were forwarded to the Evaluation Committee. The committee did not require further clarification or additional information.
Evaluation Forms Sent	06/30/21	Evaluation forms were forwarded to the voting committee members.
Evaluation Forms Returned	07/12/21	The last set of evaluation forms were returned to the Purchasing Division.
Evaluation Results	07/16/21	The evaluation results were forwarded to the committee.
Recommendation of Committee	07/19/21	The voting committee members unanimously recommended award to the highest-ranking firm of Yates Insurance Agency, Inc. dba Yates, Woolfolk & Turner

Evaluation Committee:

The proposals were reviewed by members of the Evaluation Committee, which consisted of (1) voter from the Human Resources Department, (1) voter from the Public Works Department and (1) voter from Muscogee County Sheriff’s Office.

An additional representative from the Muscogee County Sheriff’s Office and a representative from the Columbus Fire/EMS Department served as alternate voters.

Two (2) additional representatives from the Human Resources Department served as non-voting advisors.

Award Recommendation:

Based on the evaluation results, the Committee unanimously recommended award to Yates Insurance Agency, Inc. dba Yates, Woolfolk & Turner, who was the highest ranked vendor.

Vendor Qualifications/Experience:

- The firm is privately held and is one of Georgia’s oldest and largest agencies.
- Most of the firm’s carrier/agency agreements are preferred agent status.
- The firm employs over 150 associates and has a premium volume in excess of \$200 million.
- The departments of the firm include commercial property and casualty, surety bonds, employee benefits, individual life and health, personal insurance, marketing, and claims.
- Listed below are the last three (3) clients for whom the firm has provided the same or similar services:

- o Columbus Airport Commission
Manages the entire insurance program – all lines. Contract began in July 2014 and the insurance renews in July 2021.
- o The Hughston Clinic, PC & Jack Hughston Memorial Hospital
Manages the entire insurance program – all lines for both entities. Property schedule over \$147 million. The contract began in April 2014 and the insurance ends in November 2021.
- o Teen Challenge – SE Region & Global Teen Challenge
Manages the entire insurance program – all lines for both entities. Property schedule over \$56 million. The contract began in February 2017 and the insurance expires in April 2022.

The City's Procurement Ordinance, Article 3-110, (Competitive Sealed Proposals (Negotiations)) governs the RFP Process. During the RFP process, there is no formal opening due to the possibility of negotiated components of the proposal. In the event City Council does not approve the recommended offeror, no proposal responses or any negotiated components are made public until after the award of the contract. Therefore, the evaluation results and cost information has been submitted to the City Manager in a separate memo for informational purposes.

Funds are budgeted each fiscal year for this ongoing expense: Risk Management Fund – Human Resources – Unfunded Claims – Property & Casualty Insurance; 0860-220-3830-RISK-6611.

A RESOLUTION

NO. _____

A RESOLUTION AUTHORIZING THE EXECUTION OF AN ANNUAL CONTRACT WITH YATES INSURANCE AGENCY, INC. DBA YATES, WOOLFOLK & TURNER (COLUMBUS, GA) FOR GENERAL INSURANCE PLACEMENT, INCLUDING, BUT NOT LIMITED TO, PROPERTY & CASUALTY INSURANCE FOR ALL CITY FACILITIES, CRIME INSURANCE AND CYBER INSURANCE. THE HUMAN RESOURCES DEPARTMENT/RISK MANAGEMENT WILL PROCURE THE SERVICES ON AN AS-NEEDED BASIS. THE RECOMMENDED VENDOR’S COST PROPOSAL IS WITHIN BUDGET.

WHEREAS, an RFP was administered (RFP No. 21-0033) and two (2) proposals were received; and,

WHEREAS, the proposal submitted by Yates Insurance Agency, Inc. dba Yates, Woolfolk & Turner (Columbus, GA) met all proposal requirements and was evaluated most responsive to the RFP; and,

WHEREAS, the contract period shall be for two (2) years, with the option to renew for three (3) additional twelve-month periods. Contract renewal is contingent upon the mutual agreement of the City and the Contractor.

NOW, THEREFORE, THE COUNCIL OF COLUMBUS, GEORGIA, HEREBY RESOLVES AS FOLLOWS:

That the City Manager is hereby authorized to execute an annual contract with Yates Insurance Agency, Inc. dba Yates, Woolfolk & Turner (Columbus, GA) for general insurance placement, including but not limited to, Property & Casualty insurance for all City facilities, Crime insurance, and Cyber insurance. Funds are budgeted each fiscal year for this ongoing expense: Risk Management Fund – Human Resources – Unfunded Claims – Property & Casualty Insurance; 0860-220-3830-RISK-6611.

_____ Introduced at a regular meeting of the Council of Columbus, Georgia, held the _____ day of _____, 2021 and adopted at said meeting by the affirmative vote of _____ members of said Council.

- Councilor Allen voting _____.
- Councilor Barnes voting _____.
- Councilor Crabb voting _____.
- Councilor Davis voting _____.
- Councilor Garrett voting _____.
- Councilor House voting _____.
- Councilor Huff voting _____.
- Councilor Thomas voting _____.

Councilor Tucker voting _____.
Councilor Woodson voting _____.

Sandra T. Davis, Clerk of Council

B.H. "Skip" Henderson III, Mayor