FINANCE & ADMINISTRATION DEPARTMENT

TO: Greg Pease, Chairperson, Professional Services Evaluation Committee

COPY: Alex Baker, PSEC Specialist

FROM: Twane Duckworth, Chief of Risk Management
Ann Willis, Property & Casualty Compliance Administrator

DATE: June 26, 2017

RE: 8518-03 Property Insurance Broker Services Contract – AMD #~~3~~ 4 P-43-14

The current contract No. 8518-03 Property Broker Services in the Scope of Services allows for placement of property, boiler & machinery and terrorism coverage by Arthur J. Gallagher Risk Management Services, Inc.

It is respectfully requested that City Contract No. 8518-03, with Arthur J. Gallagher Risk Management Services, Inc., be amended for the procurement of an appraisal for the City's property in the open. This appraisal is needed to update the City's property schedule for both insurance and FEMA purposes.

The new maximum indebtedness should be adjusted from $13,317,720.00 by a not to exceed amount of $71,000.00 for a new maximum indebtedness of $13,388,720.00. All other contract terms and conditions shall remain the same (nothing contained herein shall be amended, modified. or otherwise revised without prior PSEC and Mayor's approval).

Exhibits for your review:
Exhibit F – Proposal from Arthur J. Gallagher Risk Management Services, Inc.'s Appraisal Vendor Duff & Phelps

Thank you for your consideration.

117 W. Duval Street, Suite 335 Jacksonville, FL 32202 | Phone: 904.630.1307 Fax: 904.630.2913 www.coj.net

Lynn Forsythe
Duff & Phelps, LLC
259 Woodland Road, Wrightstown, PA 18940
T +1 215 698 9304

DUFF & PHELPS

June 22, 2017

Ms. Judy Arenz, CPCU
Area Senior Vice President
Arthur J. Gallagher & Co.
2255 Glades Road, Suite 200E
Boca Raton, FL 33431

Dear Ms. Arenz:

Duff & Phelps, LLC ("Duff & Phelps"), will provide Arthur J. Gallagher & Co. ("Arthur J. Gallagher & Co.") the appraisal services described within this agreement ("Agreement") for the City of Jacksonville.

Purpose of the Engagement

The purpose of this engagement is to provide Arthur J. Gallagher & Co. a property insurance appraisal for Arthur J. Gallagher & Co.'s use in connection with its internal analysis of its insurance needs with respect to the identified property. Our analysis will be dated as of the last day of our site inspection. Our opinion is intended to assist Arthur J. Gallagher & Co. in making informed business decisions; it is not a recommendation. Any decisions relating to insurance coverage shall remain Arthur J. Gallagher & Co.'s responsibility and be made solely at its discretion.

Engagement Scope

We will research and report the insurable value (our "Opinion") of certain City of Jacksonville property.

Description of Identified Property

The property is located at 334 sites as identified by Arthur J. Gallagher & Co. in the Property Schedule (Exhibit B).

These property classifications will be included in the engagement:

1) Land improvements (property in the open)

Assets not identified above will be excluded from the engagement.

If Arthur J. Gallagher & Co.'s insurance policy excludes coverage of specific property classifications, in part or whole, Arthur J. Gallagher & Co. should notify us in writing prior to beginning the engagement if those assets should be excluded.

We will work with Arthur J. Gallagher & Co. during the engagement to further refine the scope of the identified property to be included in the engagement, if applicable. Depending on the nature and extent of changes in the scope of the engagement we may need to revise our fee.

Definition of Insurable Value

We will develop our opinion of insurable value as cost of reproduction new ("CRN"), defined as the estimated amount required to reproduce a duplicate or a replica of the entire property at one time, in like kind and materials, in accordance with current market prices for materials, labor, and manufactured equipment; contractors' overhead and profit; and fees, but without provision for overtime, bonuses for labor,

or premiums for material or equipment. CRN, as defined, is synonymous with the insurance-industry term "replacement cost new."

In estimating insurable value, we will allow for national building codes; however, we will not consider any construction codes imposed by state or local municipalities, ordinances, or other legal restrictions, nor will we consider the cost of demolition in connection with reconstruction or the cost of removal of destroyed property.

Valuation Methodology

Our appraisal will rely solely on the cost approach because the market and income approaches are not applicable for the purpose of this engagement.

Scope of Work

Land Improvements (Property in the Open)

We will inspect and appraise land improvements (property in the open), such as playground equipment, signage, fencing, outdoor lighting, antennas, radio towers, etc. In addition, it has been requested that these items also be captured: docks, wharves, piers, boat ramps. These will be appraised and reported in aggregate by asset category.

Terms and Conditions

This Agreement is subject to and incorporates the **Terms and Conditions** attached as **Exhibit A**.

Fee

The fee is $71,000, including expenses, and will be invoiced as follows:

- $20,000 upon authorization of the engagement
- Progress billing as time is charged and expenses are incurred

This fee includes issuing the deliverables below and responding to customary questions from Arthur J. Gallagher & Co. and its insurance brokers or advisors. Additional fee will be required for an increase in engagement scope or involvement in subsequent reviews beyond the customary work effort.

Arthur J. Gallagher & Co. may cancel this engagement at any time and will only be obligated for fees and expenses incurred. Our fee is not contingent on our Opinion or any subsequent event related to it.

Timing and Deliverables

This engagement will require cooperation, access, and timely receipt of requested information from management of Arthur J. Gallagher & Co. After this Agreement is signed and all requested information is received, we will begin our analyses and provide our Final report within 6 to 8 weeks after completion of our site inspections.

The report will be provided in electronic format and will present our Opinion and related narrative discussion of the supporting analyses and assumptions, along with appropriate exhibits. Additional relevant information and analyses considered in our Opinion will be retained in our work files.

Conclusion

We appreciate the opportunity to serve Arthur J. Gallagher & Co. To authorize, please sign below and return the full executed copy to lynn.forsythe@duffandphelps.com. This Agreement shall remain valid for signature for 30 days. Please contact me at 215 598 9304 with any questions.

Sincerely,

Lynn Forsythe

Lynn Forsythe
Managing Director

Client of Record:
Arthur J. Gallagher & Co.

Signature: Judith Arenz
Name: JUDITH ARENZ
Title: AREA SR. VICE PRESIDENT
Date: 6/27/17

Exhibit A – Terms and Conditions

Entire Agreement – This is the entire Agreement between Duff & Phelps and Arthur J. Gallagher & Co. and supersedes any prior oral or written agreements. This Agreement may only be modified in writing signed by both parties. Any purchase order covering this engagement is only for Arthur J. Gallagher & Co.'s internal needs and shall not modify this Agreement.

Fees – Duff & Phelps' invoices are payable upon receipt. If payment of any invoice is not received within 45 days of the invoice date, Duff & Phelps shall be entitled, without prejudice to any other rights that it may have, to suspend services until all sums due are paid in full. In the event that Duff & Phelps is required to initiate a lawsuit or hire attorneys to collect any past due amounts, in addition to any other rights and remedies available, it shall be entitled to reimbursement of attorneys' fees and other costs of collection.

Limited Use and Reliance – Arthur J. Gallagher & Co. is the sole intended user of Duff & Phelps' report or other work product. Arthur J. Gallagher & Co. may disclose an informational copy of the report or other work product to its audit, tax, legal, or insurance professionals acting in an advisory capacity in connection with the purpose of this engagement. No third party shall have the right of reliance on the report, and neither receipt nor possession of the report by any third party shall create any express or implied third-party beneficiary rights.

Confidentiality – Duff & Phelps shall maintain the confidentiality of Arthur J. Gallagher & Co.'s information and will not disclose or use it for any purpose other than in connection with this engagement. This excludes information (i) available to the public, (ii) already in Duff & Phelps' possession, or (iii) received from a party having no confidentiality obligation to Arthur J. Gallagher & Co. Duff & Phelps may include Arthur J. Gallagher & Co.'s name and logo in its client list.

Engagement Limits – Duff & Phelps' work may only be used for the specific purpose or premise of value stated in this Agreement and the work product. Arthur J. Gallagher & Co. shall not reference Duff & Phelps or its work in any public filing or other materials distributed to actual or prospective shareholders, investors, financing parties, or similar third parties without Duff & Phelps' prior written consent.

Independent Contractor – Duff & Phelps shall perform as an independent contractor, with no authority to bind or obligate Arthur J. Gallagher & Co. in any way.

Information Provided by Arthur J. Gallagher & Co. – Duff & Phelps will not independently verify information provided by Arthur J. Gallagher & Co., its advisors, or third parties acting at Arthur J. Gallagher & Co.'s direction. Duff & Phelps will assume and rely on the accuracy and completeness of all such information.

Retention – All files, documents, and work papers received, created, or developed during the engagement will be retained for professional recordkeeping and legal/regulatory compliance purposes, all in accordance with Duff & Phelps' document retention policy. If required by applicable law to disclose any of the documents, Duff & Phelps will, unless legally prohibited, notify Arthur J. Gallagher & Co. so it may seek a protective order at its discretion.

Indemnification – Arthur J. Gallagher & Co. shall indemnify and hold harmless Duff & Phelps and its affiliates, including each of their respective employees, from and against any and all liabilities, losses, costs, and reasonable expenses, including, but not limited to, reasonable legal fees and expenses and billable hours of client service personnel, which are (i) incurred in responding to subpoenas, discovery, or other similar inquiries associated with or arising from the engagement or (ii) arising from or relating to third-party claims based on reliance or purported reliance on Duff & Phelps' work product or other alleged loss or damage caused to or alleged by any nonclient entity arising from unauthorized access to or reliance upon Duff & Phelps' work product. The foregoing indemnification obligations shall not apply in the event that a court of competent jurisdiction finally determines that such claims resulted directly from the gross negligence, willful misconduct, or fraudulent acts of Duff & Phelps.

Limitation of Liability – In no event shall Duff & Phelps be liable to Arthur J. Gallagher & Co. (or any person claiming through Arthur J. Gallagher & Co.) under this Agreement, under any legal theory, for any amount in excess of the total professional fees paid by Arthur J. Gallagher & Co. to Duff & Phelps in connection with this engagement, except to the extent such liability is directly caused by Duff & Phelps' gross negligence, fraud, or willful misconduct. The foregoing limitation of liability shall not apply to liabilities that arise from personal injury or property damage resulting primarily from Duff & Phelps' negligence or willful misconduct. In no event shall Duff & Phelps be liable to Arthur J. Gallagher & Co. for any consequential, indirect, lost profit, or similar damages relating to or arising from this engagement.

Environmental Policy – Duff & Phelps will not investigate, nor assume responsibility for, the existence or impact of any contamination or hazardous substance related to property or assets associated with this engagement.

Governing Law – This Agreement is governed by and construed in accordance with the laws of the State of New York.

Exhibit B – Location Listing – PITO

ADOLPH WURN POOL
AGRICULTURE CENTER
ALBERT FIELD
ALEJANDRO GARCES CAMP TOMAHAWK
ANDREW JACKSON PARK
ANIMAL CARE AND PROTECTION
ARGYLE BRANCH LIBRARY
ARGYLE FOREST PARK
ARLINGTON LIONS CLUB PARK
ARLINGWOOD PARK
BAKER SKINNER PARK
BALIS PARK
BARNEY BROWNING PARK
BEACHES BRANCH LIBRARY
BEACHES SENIOR CENTER
BEACHWOOD CENTER
BERT MAXWELL BOAT RAMP
BESSIE CIRCLE HOUSE
BETHESDA COMPLEX-COMMUNITY
BEVERLY HILLS COMMUNITY CENTER
BLACK HAMMOCK ISLAND PARK
BLUE CYPRESS PARK
BOONE PARK PRO SHOP BUILDING
BRACKRIDGE PARK
BRADHAM BROOKS BRANCH LIBRARY
BROOKVIEW PARK
BROWN EASTSIDE BRANCH LIBRARY
BROWN PARK PRO SHOP
BRUCE PARK
BURNETT PARK
CARVILL COMMUNITY CENTER
CASTAWAY PARK
CECIL FIELD GOLF COURSE
CECIL PINES OFFICE BUILDING
CENTRAL HEALTH PLAZA
CHARLES REESE MEMORIAL PARK
CHILDREN'S COMMISSION FACILITY
CHUCK ROGERS PARK
CITY HALL/COUNTY COURTHOUSE
COMMUNITY CORRECTIONS CENTER
CONFEDERATE PARK
CONFEDERATE PLAYGROUND
CRISWELL PARK COMPLEX
CRYSTAL SPRINGS ROAD PARK
CUBA HUNTER PARK
CUBA HUNTER PARK
DALLAS GRAHAM BRANCH LIBRARY
DANESE PARK
DAVIS PARK
DINSMORE COMMUNITY CENTER
DINSMORE PARK
DIVISION BUILDING
DREW FIELD
DUVAL COUNTY UNIFIED COURTHOUSE
EARL JOHNSON PARK
EAST AREA YARD COMPLEX
EASTSIDE CIVIC CENTER
ED AUSTIN PARK
EMMETT REED RECREATION CENTER
EQUESTRIAN CENTER
FIRE & RESCUE HEADQUARTERS
FIRE MUSEUM (FIRE STATION 03)
FIRE STATION 1
FIRE STATION 10
FIRE STATION 11
FIRE STATION 12
FIRE STATION 13
FIRE STATION 14
FIRE STATION 15
FIRE STATION 17
FIRE STATION 18
FIRE STATION 19
FIRE STATION 2
FIRE STATION 21
FIRE STATION 22
FIRE STATION 23
FIRE STATION 24
FIRE STATION 24
FIRE STATION 25
FIRE STATION 26
FIRE STATION 28
FIRE STATION 29
FIRE STATION 30
FIRE STATION 31
FIRE STATION 32
FIRE STATION 33
FIRE STATION 34
FIRE STATION 35
FIRE STATION 36
FIRE STATION 37
FIRE STATION 38
FIRE STATION 39
FIRE STATION 4
FIRE STATION 40 (NEW)
FIRE STATION 41
FIRE STATION 44
FIRE STATION 45
FIRE STATION 46
FIRE STATION 49
FIRE STATION 5 (OLD)

FIRE STATION 50
FIRE STATION 51
FIRE STATION 52
FIRE STATION 53
FIRE STATION 54
FIRE STATION 57
FIRE STATION 59
FIRE STATION 60
FIRE STATION 7
FIRE STATION 9
FISHWEIR PARK
FLETCHER PARK
FLYNN PLAYGROUND
FOREST PARK RECREATION CENTER
FORT CAROLINE CENTER
FORT GEORGE
FRIENDSHIP PARK & FOUNTAIN
GARDEN CITY ELEMENTARY PARK
GEORGE KERNS COMPLEX
GIRLS CLUB
GLYNLEA PARK
GLYNN MYRA CENTER
GRAND PARK
GREENLAND PARK
GUN RANGE-PRESS
HAMMOND PARK
HAMMOND PARK COMMUNITY CENTER
HANNA PARK ENTRY BUILDING
HARBORVIEW PARK
HECKSCHER RECREATION CENTER
HENRY T. JONES PARK
HIGHLAND REGIONAL BRANCH LIBRARY
HOLIDAY HILL PARK
HUGUENOT PARK
ISLE OF PALMS PARK
J E B STUART CONGO RESTROOMS
JACKSONVILLE HEALTH CENTER
JACKSONVILLE MARITIME MUSEUM
JAMES FIELDS PARK
JAMES SMALL BALLPARK
JAX BALDWIN RAIL TRAIL
JEFFERSON CENTER
JEFFERSON PARK
JONES STREET PARK
JOSEPH LEE COMMUNITY CENTER
JSO ARCHIVES AND WAREHOUSE
JSO MOUNTED/CANINE POLICE
JSO PROPERTY EVIDENCE FACILITY
JSO VEHICLE IMPOUND WAREHOUSE
JUSTINA PARK
KOOKER PARK
LAKE LUCINA
LAND IMPROVEMENTS
LANE WILEY SENIOR CENTER
LANNIE ROAD PARK
LEGENDS CENTER
LEM MERRETT PARK
LEONARD ABESS PARK
LIGHTHOUSE BOAT RAMP
LONGBRANCH COMMUNITY CENTER
LONNIE MILLER PARK
LOSCO REGIONAL PARK
LOUIS DINAH SENIOR CENTER
LOVELACE PARK
MALIVIA WASHINGTON YOUTH CENTER
MALLISON COMMUNITY CENTER
MANDARIN PARK
MANDARIN REGIONAL BRANCH LIBRARY
MANDARIN SENIOR CENTER
MARIETTA CENTER
MARIETTA CLINIC
MARY SINGLETON CENTER
MAXVILLE BRANCH LIBRARY
MAXVILLE COMMUNITY CENTER
MAXVILLE RECREATION COMPLEX
MAXVILLE STATION 43
MAYPORT
MAYPORT COMMUNITY CENTER
MCBRITS CREEK COMPLEX
MCGRITS CREEK PARK
MCNAIR PARK
MEDICAL EXAMINER
METRO PARK
MITCHELL PARK CENTER
MONCRIEF COMMUNITY CENTER
MONTGOMERY CORRECTIONAL-INDUSTRY
MONTGOMERY CORRECTIONAL-OFFICE
MORGAN PARK
MOSQUITO CONTROL COMPLEX
MOTOR VEHICLE INSPECTION STATION
MURRAY HILL ART CENTER
MURRAY HILL BRANCH LIBRARY
MURRAY HILL PARK
NAVAL CHAPEL
NORMANDY BOULEVARD SPORT COMPLEX
NORMANDY PARK
NORTHSHORE PICNIC SHELTER
OCEANWAY SENIOR CENTER
OLD BRICK BUILDING
OLD FIRE STATION 40
OLD SOUTHSIDE CITY HALL
PABLO CREEK LIBRARY
PALMS FISH CAMP
PANAMA PARK
PARKING FACILITY
PARKWOOD HEIGHTS PARK

PATTON PARK
PEARSON DAYCARE CENTER
PINE FOREST COMPLEX
POLICE AND FIRE PENSION PARKING
POLICE ANNEX
POLICE MEMORIAL BUILDING
PRE-TRIAL SERVICES
PRIME OSBORNE CONVENTION CENTER
PUBLIC WORKS SOUTH AREA
PUBLIC WORKS-COMMUNICATIONS
PUBLIC WORKS-FLEET
PUBLIC WORKS-HAZARDOUS WASTE
PUBLIC WORKS-SAFETY
PUBLIC WORKS-SOLID WASTE A
PUBLIC WORKS-TRAFFIC OPERATIONSA
RAY GREEN CENTER
RECREATION MAINTENANCE COMPLEX
REGENCY SQUARE BRANCH LIBRARY
RINGHAVER PARK
RITZ THEATRE
RIVERVIEW COMMUNITY CENTER
ROBERT F. KENNEDY CENTER
RONDETTE PARK
ROYAL TERRACE
SAINT NICHOLAS PARK
SAN MARCO BRANCH LIBRARY
SAN MATEO ELEMENTARY CONCESSION
SCHELL MEMORIAL PARK
SCHELL-SWEET COMMUNITY CENTER
SCOTT PARK
SHERIFF'S AVIATION UNIT
SIMONDS JOHNSON RECREATION CNTR
SISTERS CREEK MARINA
SOUTH MANDARIN BRANCH LIBRARY
SOUTHEAST BRANCH LIBRARY
SOUTHSIDE ESTATES PARK
SOUTHSIDE PARK COMPLEX
SPORTS COMPLEX
STEVENS RAMP/DOCK
SUNNY ACRES RECREATION COMPLEX
SUPERVISOR OF ELECTIONS OFFICE
SURPLUS YARD
T. K. STOKES PARK
TACTICAL SUPPORT
THOMAS MARSHALL PARK RESTROOM
TILLIE FOWLER PARK
TIMES UNION CENTER
TIRE SHOP
TOOLHOUSE BUILDING
TRAIL RIDGE LANDFILL
VICTIM SERVICES BUILDING
VICTORIA PARK
VICTORY PARK RESTROOM
WALTER JONES HISTORICAL PARK
WAREHOUSE
WAREHOUSE AND STORAGE SITE
WARRINGTON PARK
WEBB WESCONNETT LIBRARY
WESCONNETT FAMILY HEALTH CENTER
WEST REGIONAL BRANCH LIBRARY
WEST YARD - A
WESTBROOK BRANCH LIBRARY
WESTBROOK PARK COMMUNITY CENTER
WESTSIDE SENIOR CENTER
WHEAT FIELD PARK 2
WHEAT ROAD PARK 1
WHITEHOUSE PLAYGROUND
WILLOW BRANCH LIBRARY
WINDY HILLS PARK
WOODSTOCK COMMUNITY CENTER
WORK RELEASE FACILITY
YANCY PARK

Exhibit B (continued) - Warfingers Property Listing

Alimacani
Arlington Boat Ramp
Arlington Lions Club Boat Ramp
Bert Maxwell
Blue Cypress Park
Castaway Island Preserve
County Dock
Cradle Creek Preserve
Curtis Lee Johnson Boat Ramp
Dinsmore Boat Landing
Dutton Island Preserve
Fulton Boat Ramp
Harborview Boat Ramp
Hood Landing
Huguenot Memorial Park
Intracoastal Waterway
Jacksonville Landing Docks
Jim King Park and Boat Ramp @ Sister's Creek
Joe Carlucci Boat Ramp
John Lowe Boat Ramp
Lonnie Wurn
Mandarin Park Boat Ramp
Mayport Boat Ramp
Metro Park Marina Docks
Nathan Krustel Park
New Berlin Boat Ramp
North Shore Park
Oak Harbor
Palmetto Leaves Kayak Launch
Palms Fish Camp
Pottsburg Creek
Reddie Point
Ribault River Preserve
Ringhaver Park
Riverside Arts Market floating docks (210 ft)
Riverview Park
Riverwalk
Southbank Docks (Riverwalk)
St Johns Marina
Stinson Park
Thomas Creek
TK Stokes
Wayne B Stevens

12. Enrollment Documentation – Will provide all Annual enrollment documentation that is sent out to employees/retirees each year.

Two of your best opportunities to communicate how much you care about your employees' wellbeing coincide with two of the biggest jobs for your benefits administrative staff. Open enrollment and new hire orientation are key touchpoints for influencing the employee experience, so they call for a carefully considered strategic approach. Designing programs specifically for your workforce and culture will return the greatest value on the time, effort and financials you invest in these priorities.

We can help you plan and carry out the most effective approaches to open enrollment and new hire orientation based on the City's unique communication style, including:

- Enrollment strategy
- Customized communications such as announcement letters, letters from your leadership team, enrollment forms, open enrollment brochures, posters, articles for your internal newsletter and intranet, electronic information, payroll stuffers and other vehicles
- Customized presentation of open enrollment programs and open enrollment meetings
- Employee health fairs

13. Claims Review – provide periodic review and audit of medical claims processed by the health plan administrator.

Putting a strategically solid employee benefits program in place for the City is just the beginning. Using our proprietary data warehousing tools, your Gallagher team will constantly monitor each carrier's claims management results to study claims history, evaluate current costs and project future expenditures. We periodically meet with each insurer to review utilization rates, disease management effectiveness, network performance and catastrophic case management. Insurers are required to explain their claims management practices, including setting reserves and estimating incurred but not reported (IBNR) claims.

14. Services

Services	Included
Day to Day	
Administrative reviews	✓
Quality of Care initiatives	✓
Eligibility	✓
Billing issues	✓
Claims resolution	✓

Services	Included
Benefit questions	✓
Carrier/Administrator liaison	✓
Benefit Committee meetings	✓
City meetings	✓
Meeting with vendors	✓
Compliance Consulting	
Annual compliance consultation and checklist review	✓
Review administrative procedures: i.e., COBRA, ERISA, FMLA, HIPAA, ADA, etc.	✓
Reduce claim disputes by reviewing the plan documents for consistency and clarity	✓
Review insurance contracts for accuracy with negotiations	✓
Provide discrimination testing	✓
Confirm plan design compliance with state and federal regulations	✓
Review and audit benefit plan documents	✓
Conduct a review of Summary Plan Descriptions, contracts, employee summaries, and policies/ procedures to outline variances and inconsistencies	✓
Provide access to technical consultants for advice and direction on legislative issues	✓
Compliance Training	
National Healthcare Reform	✓
HIPAA – Privacy, Security and EDI	✓
HIPAA – Nondiscrimination	✓
COBRA Basics	✓
Regulatory Overview	✓
Family Medical Leave Act (FMLA)	✓
State requirements for non-Federal governmental entities	✓
RFP Process	
Strategic planning sessions with the client	✓
Establish timelines for the RFP process	✓
One on one meeting with the insurance carriers or Administrator	✓
Develop benefit goals and objectives of the RFP	✓
Develop financial goals and objectives "Benefit to Budget"	✓
Discuss funding methodologies	✓

Services	Included
Develop selection criteria	✓
Develop RFP benefit design parameters	✓
Develop administrative requirements	✓
Develop provider network parameters	✓
Write and develop hardcopy and electronic copies of RFP	✓
Conduct RFP mandatory meeting with the vendors	✓
Answer potential proposer questions	✓
Perform a complete RFP response analysis and summary	✓
Complete a financial and actuarial analysis of the proposal responses	✓
Selection criteria analysis and process	✓
Write and develop a summary binder of all proposal responses and distribute to the Selection Committee	✓
RFP finalist selection	✓
Finalist rate and pricing negotiations	✓
Finalist contract negotiations	✓
Plan implementation timetable	✓
Plan implementation	✓
RFP process review	✓
Renewal Process	
Strategic planning sessions with the client	✓
Perform a complete renewal analysis	✓
Establish timelines for the renewal process	✓
Develop renewal benefit design parameters	✓
One on one meeting with the renewal carriers or Administrators	✓
Develop benefit goals and objectives	✓
Develop financial goals and objectives "Benefit to Budget"	✓
Discuss funding methodologies	✓
Renewal alternatives	✓
Review administrative requirements	✓
Review provider network parameters	✓
Renewal rate and pricing negotiations	✓

Services	Included
Renewal contract negotiations	✓
Renewal plan implementation timetable	✓
Negotiate optimum renewal position for the City	✓
Negotiate multiple year rate guarantees where appropriate	✓
Actuarial Consulting	
Benefit pricing	✓
Risk analysis	✓
Annual actuarial report filing and assistance in dealing with external audits	✓
Annual report on self-insured projections	✓
Actuarial estimate of how many claims exceeding a given threshold should be expected in an average year	✓
Extensive actuarial input on GASB issues	✓
Outside review of the self-funded plan's IBNR estimate at renewal time	✓
Medical management	✓
Actuarial models showing a range of possible outcomes, allowing you to see the best case, worst case, and most likely results for each flex plan alternative	✓
Medical and disease management outreach and compliance	✓
Rate base (administrative fees, claims projections)	✓
Employee contribution models	✓
Employee engagement tools and usage (incentive models)	✓
Benefit modeling and relationships	✓
Provider network reimbursement levels	✓
Centers of Excellence and provider designation programs	✓
Trend used by carriers or other entities	✓
Administrative efficiencies and employee communication outreach success	✓
Predictive modeling	✓
Population/demographic review	✓
GASB Reporting	✓
Medicare Part D Evaluation (RDS)	✓
ERRP	✓
Cost Forecasting and Budgeting	

Services	Included
Pre-renewal – a report provided 9 months before renewal	✓
Renewal – a report provided 8 months before renewal	✓
Plan funding methodology	✓
Claims experience	✓
Rate setting recommendations	✓
Trend analysis	✓
Medical utilization analysis	✓
Reinsurance coverage analysis	✓
Reserve calculations	✓
Plan design changes	✓
Retention	✓
Profile adjustment	✓
Trend factors	✓
Reporting	
Monthly Reports • Summary of plan costs • Tracking of large claims • IBNR Analysis	✓
Quarterly Reports • Comparison of plan costs to projections • Identification of services provided • Identification of plan costs by specific line of coverage (i.e. medical, dental, pharmacy, etc.) • Utilization review • Tracking of large claims • Comparisons to prior claims periods • Plan trends	✓
Annual Reports • Executive summary of program expenses • Comparison of current costs to renewal costs • Renewal alternatives • Incurred but not reported (IBNR) dollar projections • Overview of specific stop loss projections • Future plan cost projections • Dollars saved by contract negotiation • Percent of benefit dollars paid by employee • Claims by size • Physician visit details • Benefits paid by type of service • Plan funding/budget comparison • Fixed cost comparison • Actuarial filing with the Florida Office of Insurance Regulation	✓
Client Education and Information	

Services	Included
Technical Bulletins – focuses on new and pending legislation	✓
Training on administrative processes needed for compliance	✓
Webinars/Seminars	✓

15. The Consultant will be directly responsible to the City Compensation and Benefits Chief located at, 117 W. Duval Street, Suite 150, Jacksonville, Florida 32202. The effective date shall be January 1, 2018. The consultant shall have an office in Jacksonville and be available at short notice to assist the City with any issues for which it is retained.

Confirmed.