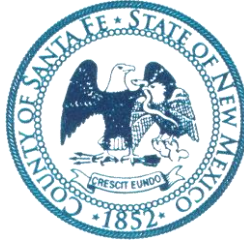


**Henry P. Roybal**  
Commissioner, District 1

**Anna Hansen**  
Commissioner, District 2

**Robert A. Anaya**  
Commissioner, District 3



**Anna T. Hamilton**  
Commissioner, District 4

**Ed Moreno**  
Commissioner, District 5

**Katherine Miller**  
County Manager

August 23, 2017

**SANTA FE COUNTY**  
**RFP# 2018-0005-AT/MM**  
**INSURANCE BROKER AND CONSULTING SERVICES**

**ADDENDUM #1**

Dear Proponents,

This addendum is issued to reflect the following immediately. It shall be the responsibility of interested Offerors to adhere to any changes or revisions to the RFP as identified in this Addendum No. 1. This documentation shall become permanent and made part of the departmental files.

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***Attachment A: Pre Proposal Agenda and Sign in Sheet***

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Question #1: How long has the County been with Daniel's Insurance?

**Answer #1: Santa Fe County has been with Daniel's Insurance since 2009.**

Question #2: Why did the County switch from One Beacon to New Mexico Association of Counties (NMAC)?

**Answer #2: Santa Fe County via their Broker goes out for bid on an annual basis in which all bids are assessed and reviewed for best possible insurance coverages.**

Question #3: What is the effective date of the contract brokerage services?

**Answer #3: The County is anticipating the Brokerage Services to start late September early October 2017.**

Question #4: Who will be reviewing the RFQ's?

**Answer #4:** RFQ's are reviewed by Santa Fe County Staff along with the recommendation of the broker.

Question# 5: Please clarify the General Liability insurance requirement is it \$1,000,000 or \$1,050,000.

**Answer# 5:** The General Liability insurance requirement is \$1,050,000.

Question# 6: Please clarify the list of coverages where the County may require consulting.

**Answer# 6:** General Liability, Property Liability, Law Enforcement, Auto, Professional Liability Coverage for Med Mal Insurance, Engineer and Architect Liability Coverage, Pollution Liability, Builder's Risk, TULIP, AD&D-National Union Fire, Med Mal for Mobile Health Unit, Treasurer's and Deputy Treasurer Bond, Notary Bond

Question# 7: Is the coverage for the volunteer firefighters including AD & D, Liability, property etc. completely separate from the rest of the County's program?

**Answer# 7:** Please answer #14.

Question# 8: Please provide a summary of the types of bonds currently purchased by the County.

**Answer# 8:** Individual Notary Bonds

**Blanket Position schedule bond which provides for the following positions and limits:**

**County Commissioners 5 @ \$5,000 each w/\$25,000 aggregate**

**County Assessor @ \$5,000 w/\$5,000 aggregate**

**County Clerk @ \$10,000 w/\$10,000 aggregate**

**County Sheriff @ \$20,000 w/\$20,000 aggregate**

**County Treasurer @ \$50,000 w/\$50,000 aggregate**

**County Probate Judge @ \$5,000 w/\$5,000 aggregate**

**Individual bond for the Treasurer at \$50,000**

**Individual bond for the Deputy Treasurer at \$50,000**

Question# 9: In regards to Section II. C. B. 6, which organizations are competitors of the County?

**Answer# 9:** All organizations which carry insurance, the County is looking for strategies and/or improvements to the County's Insurance.

Question# 10: Can the County provide the last 10 years of loss runs, payroll data and a copy of the current policy of all lines of coverage.

Answer# 10: **This is a qualification based Request for Proposal (RFP) this information will be provided during the negotiations phase with the highest ranked offeror.**

Question# 11: What is the current fee schedule that Santa Fe County is paying for broker services?

Answer# 11: **The County prefers to have a quarterly billing cycle but this can be negotiated with the highest qualified offeror.**

Question# 12: Does the veterans preference apply to members on the team who are veteran or does the agency owner have to be a veteran?

Answer# 12: **The veterans preference is for veteran-owned small businesses. Please visit the State of New Mexico Taxation & Revenue Department at <http://www.tax.newmexico.gov/Businesses/in-state-veteran-preference-certification.aspx> for any additional questions and/or information regarding the State of New Mexico Veterans Preference application process and requirements.**

Question# 13: Section IV. C. 1. E. states to respond to Santa Fe County Terms and Conditions, what Terms and Conditions is this referring to?

Answer# 13: **Please see Section III C. 15. Contract Terms and Conditions refers to the Appendix D which is the Sample Agreement attached to the RFP.**

Question #14: What are the County's current Policies and Carriers?

Answer# 14 :

<i>Type</i>	<i>Carrier</i>	<i>Limits/coverages</i>
<i>Pollution liability (Environmental/Pollution)</i>	<i>Great American</i>	<i>\$5,000,000/\$25,000 ded</i>
<i>Med Mal for Mobile Unit (Health Van)</i>	<i>Evanston</i>	<i>\$3,000,000/\$2,500 ded</i>
<i>Treasurers Bond</i>	<i>Western Surety</i>	<i>\$50,000</i>
<i>General Liability Tulip</i>	<i>Employers Fire</i>	<i>\$1,000,000</i>
<i>Property Tulip</i>	<i>Employers Fire</i>	<i>\$1,000,000</i>
<i>Package*</i>	<i>New Mexico Assoc of Counties</i>	<i>various</i>

<i>Umbrella</i>	<i>New Mexico Assoc of Counties</i>	<i>various</i>
<i>Cyber</i>	<i>New Mexico Assoc of Counties</i>	<i>\$1,000,000</i>
<i>Deputy Treasurer bond</i>	<i>Western Surety</i>	<i>\$50,000</i>
<i>Notary Bond</i>	<i>Western Surety</i>	<i>\$10,000</i>
<i>Builders Risk</i>	<i>CNA</i>	<i>\$5,000,000/25,000 ded</i>
<i>AD&amp;D (VFIS)</i>	<i>National Union Fire</i>	<i>\$255,000</i>
<i>Med Mal (Corrections)</i>	<i>Arch Specialty</i>	<i>\$1,000,000/\$3,000,000</i>
<i>Blanket Position School Bond</i>	<i>Hartford/NMAC</i>	<i>various</i>

*\*Package includes: Boiler and Machinery Insurance, Property, Law Enforcement, Crime, General Liability, Cyber, Employment Practices, Equipment, Auto, Electronic Data Process (EDP).*

Question# 15: What are the coverages the County may require consulting?

**Answer# 15: Please refer to Answer #14.**

Please add this Addendum #1 to the original proposal documents and refer to proposal documents, hereto as such. This and all subsequent addenda will become part of any resulting contract documents and have effects as if original issued. All other unaffected sections will have their original interpretation and remain in full force and effect. Responders are reminded that any questions or need for clarification must be addressed to Maricela Martinez, Senior Procurement Specialist at [mcmartinez@santafecountynm.gov](mailto:mcmartinez@santafecountynm.gov).



**PRE PROPOSAL CONFERENCE**  
**RFP # 2018-0005-AT/MM**  
**INSURANCE BROKER AND CONSULTING SERVICES**  
**AUGUST 16, 2017**  
**2:00PM**

NAME	COMPANY	TELEPHONE	E-MAIL ADDRESS
DONNOR Payne	B & B	505 821 5888	clayne@tsb3nm.com
KHAN MUHAMMAD	B & B	505 821 5888	k-muhammad@tsb3nm.com
Maricela Martinez	SFC Purchasing	505-992-9804	mmartinez@santafecountynm.gov
Robb P. Demore	USI	915-534-9710	robb.p.demore@usi.com
Stuart Kuyper	USI	505-219-0282	Stuart.Kuyper@USI.com
Joseph Lueras	USI	575-491-5691	Joseph.lueras@USI.com
Brandon Writtenberry	AON	505-280-5575	brandon-writtenberry@aon.com
Marietta Fair	Daniels	575-482-4302	mfava@danielsinsurance.com
Gregg Spivey	Bank	505-982-2802	greggspivey@bankofamerica.com
Bart Kinney	USI	505-262-2021	bart.kinney@usi.com
Robert Joe	County Attorney	505 986-6398	bjoe@santafecountynm.gov





**PRE PROPOSAL CONFERENCE**  
**RFP# 2018-0005-AT/MM**  
**INSURANCE BROKER AND CONSULTING SERVICES**  
**AUGUST 16, 2017**  
**2:00PM**

**Contracting Agency: Santa Fe County**

- |                     |                               |                     |
|---------------------|-------------------------------|---------------------|
| • Maricela Martinez | Procurement Specialist Senior | Purchasing Division |
| • Mark Lujan        | Risk Manager                  | Risk Management     |
| • Elsa Ornelas      | Administrative Assistant      | Risk Management     |

**Project Information**

Santa Fe County is requesting proposals from qualified offerors to provide Insurance Broker and Consulting Services.

**Proposal Information**

- Proposal Organization - Proposal should be organized as outlined in the RFP on page 24.
- Selection of finalist(s) – the most qualified proposal received based on the evaluation factors outlined in the RFP (pages 26-31) will be scored by a three to five member evaluation committee.
- Preferences -
  - 1) N.M. In-State Business Preference Certificate 5% of total weight of all evaluation factors added to score.
  - OR**
  - 2) N.M. Resident Veterans Preference Certificate, 10% of total weight of all evaluation factors added to score. For more information on State Preference visit [www.tax.newmexico.gov](http://www.tax.newmexico.gov)
  - AND**
  - 3) Santa Fe County Preference, 5% of total weight of all evaluation factors added to score. For more information on County Preference visit [www.santafecountynm.gov/departments/purchasing](http://www.santafecountynm.gov/departments/purchasing)
- Please submit all questions via email to Maricela Martinez at [mcmartinez@santafecountynm.gov](mailto:mcmartinez@santafecountynm.gov). The last day for questions will be **Monday, August 21, 2017. (Please do not contact any other County staff.)**
- Addendum will be issued on **Wednesday, August 23, 2017. (Only questions answered by formal written addenda will be binding. Oral and other interpretations or clarifications will be without legal effect.)**
- Proposal Submittal – **Due Date: Friday, September 8, 2017**  
**Time: 2:00 PM**  
**Location: 142 W. Palace Avenue 2<sup>nd</sup> Floor, Santa Fe, NM**