

## Addendum

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### **ADDENDUM NUMBER TWO RFP 12-2018 Agent of Record/Special Event Broker**

The above listed solicitation is hereby amended and clarified through the issuance of this addendum. The following questions were submitted on this solicitation. Questions and answers are being provided to all potential proposers to ensure fairness and impartiality.

- 1) May we request a copy of Metro's property statement of values as well as the business income worksheets used in conjunction with Metro's property insurance program with FM Global?

Answer: A statement of property values is listed under Attachment 1 to this document. The BI worksheets are not available.

- 2) As part of the renewal strategy for the property insurance program over the last 5 years, has Metro requested the current AOR (Agent of Record) to re-market the program to alternative carriers and received formal alternative quotations from the commercial insurance market?

Answer: No.

- 3) Has Metro evaluated its exposure to environmental liability or to cyber liability? Are broker services related to these exposure areas to be included in the scope of work? (For instance, if Metro were to acquire the Blue Heron site would any related project environmental risk consulting and insurance work be deemed to be included in the proposed scope of work for agent of record services?)

Answer: Risk management has not evaluated cyber liability but is involved with GASB 49 (environmental liability) reporting for Metro. If Metro decided to place insurance for either environmental or cyber liability, Metro's expectation is that the proposed agreement would cover the placement and marketing of these lines of insurance. Environmental consulting work would typically be handled by the Office of the Metro Attorney.

- 4) Can you provide an estimate of how much support ( estimated annual broker hours) the current AOR typically provides for the following services: contract review for insurance and indemnity issues; claims advocacy and related claims consulting and; safety and loss control consulting.

Answer: Contract review: 5-10 hours per year. Claim advocacy: 5-10 hours per year. Safety & loss control: 5-10 hours per year. These numbers represent estimates and some years may have higher or lower usage.



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- 5) Does the proposed scope of work include construction placement and consulting services needed for large capital projects? (say greater than \$10M).

Answer: Metro expects to be involved in several large capital projects over the life of this contract and typically requires the general contractor to provide all insurance (with the possible exception of builders risk through Metro's current property insurer). If Metro were to undertake an OCIP (Owner Controlled Insurance Program), Metro would likely solicit an OCIP broker through an RFP process. Otherwise, Metro expects ALL insurance related questions or services to be handled under this contract

- 6) What is the basis for Metro's current limit and deductible structure for the Excess Liability insurance program?

Answer: The deductible started at \$500,000 and rose to \$1M in an attempt to reduce excess liability premium costs. The initial Excess Liability limit was \$3M and increased in response to Oregon Tort Claims Act changes to \$5M. The Excess limit was increased at the beginning of the current policy year to \$7M at the direction of Metro's Chief Operating Officer.

- 7) Can you provide the 5 year history of Metro's workers compensation experience mod?

Policy Period History (Data as of 01/13/2012)						
Pol Yr	Mod	Payroll	Clm Freq	Std Prem	Tier	
2011	.96	52,847,807	.13	700,468	E	
2010	.90	53,153,357	.12	685,557	E	
2009	.95	51,805,733	.17	711,577	E	
2008	.98	50,361,156	.19	764,951	E	
2007	.98	45,814,040	.16	710,721	E	

- 8) Does Metro have an historical summary exhibit of insured claims for the P&C insurance programs?

Answer: No. Over the last 5 years, Metro has not filed a claim with its property, excess, crime or liquor liability insurer. It has filed one claim with American Family Insurance for a Parks rental property.

- 9) Can Metro provide a copy of the most recent annual risk review and recommendation report issued but the current AOR to the Risk Manager & the Finance and Regulatory Services Director?

Answer: No. Metro has not required an annual review as part of the current contract.

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- 10) In order to respond to the pricing request for the TULIP program, can you please provide a list of the 92 events listed that used the coverage during the 10-11 policy period? If the name of the event is not self-explanatory, could you please delineate what the event was?

Answer: See attachment 2.

- 11) How is the current premium paid on the Workers Compensation coverage? In installments or in full?

Answer: According to SAIF, commissions are paid on a quarterly basis approximately 30 days after each quarterly payroll report is submitted by Metro.

- 12) In reviewing the cost proposal section you indicate you would like the fee to be reduced by any commissions received from SAIF and the TULIP. We thought perhaps including the TULIP was an oversight since Metro doesn't pay the premiums on the TULIP the tenant user (public) does. Please clarify as we believe we are restricted from offsetting fees for commission received on policies where premiums are not paid by Metro.

Answer: Metro desires the lowest fee possible and potentially hopes to consolidate brokers and realize cost savings by combining the Agent of Record and Special Events Broker under one contract. Proposers should ensure fee proposals are in accordance with all applicable federal, state or local laws.

- 13) In the RFP you are asking for the following with regard to the Special Events (TULIP) program. You also limit the response to 20 pages. Do these items count against the 20 pages?:
1. Written description of the program including
    - a. How events are priced
    - b. A list of any events excluded by the program or requiring insurer approval
    - c. Actions required by facility staff to price event, approve coverage, issue certificate, record premium and reporting
    - d. Your firms experience with special events
  2. A copy or sample of the policy used in the TULIP
  3. A schedule or price list showing TULIP pricing
  4. A copy of the certificate used in the program
  5. Any forms or reports required by the facility staff to submit premium or event coverage

Answer : Items 2, 3, 4 and 5 can be included in the appendix and do not count towards the 20 page limit



**METRO**

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All other terms, conditions, and requirements of the original solicitation remain in full force.

Issued January 19, 2012

A handwritten signature in blue ink, appearing to read "Tim Collier".

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Tim Collier  
FRS Deputy Director

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Attachment 1 Metro Statement of Property Values

Name	2011 Bldg	2011 Contents	2011 Total Property	2011 Total TE	2011 Total values
Oregon Zoo	82,694,800	3,592,000	86,286,800	2,500,000	88,786,800
Metro South	7,371,000	1,130,000	8,501,000	1,457,000	9,958,000
Antoinette Hatfield Hall	41,966,400	1,380,000	43,346,400	1,291,000	44,637,400
Schnitzer Concert Hall	25,311,600	1,243,000	26,554,600	-	26,554,600
Peter West Keller Auditorium	46,190,200	893,000	47,083,200	1,291,000	48,374,200
Oregon Convention Center	239,704,000	11,709,000	251,413,000	3,469,000	254,882,000
Metro Central	15,876,000	10,010,000	25,886,000	920,000	26,806,000
Regional Center	31,894,000	9,120,000	41,014,000	459,000	41,473,000
Oxbow Park	878,300	-	878,300	-	878,300
Blue Lake	3,259,300	-	3,259,300	-	3,259,300
Chinook Marine Park, Gleason Boat Ramp, Mason Hill Park & Beggars-Tick Wildlife	758,800	-	758,800	-	758,800
Portland Exposition Center	74,030,000	2,912,000	76,942,000	1,250,000	78,192,000
Howell Park	446,300	-	446,300	-	446,300
St. Johns Landfill	3,731,500	-	3,731,500	-	3,731,500
Fine Arts	-	1,379,000	1,379,000	-	1,379,000
Latex Paint Recycling Center	182,000	158,000	340,000	-	340,000
California Condor	833,700	-	833,700	-	833,700
Sauvie Island Boat Ramp	36,000	-	36,000	-	36,000
Smith & Bybee Wetlands & Lake	260,500	-	260,500	-	260,500
Mount Talbert Park	35,800	-	35,800	-	35,800
	<b>575,460,200</b>	<b>43,526,000</b>	<b>618,986,200</b>	<b>12,637,000</b>	<b>631,623,200</b>



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### Attachment 2

## Metro Events for July 2010-July 2011 (by venue)

Date	Venue	Attendance	Class	Insured	Premium
07/09/10	ARCH	501-1500	HAZ I	University of Oregon/Oregon Bach Festival	228.00
09/17/10	ARCH	501-1500	HAZ I	The Struble Foundation	228.00
10/07/10	ARCH	501-1500	HAZ I	Institute for Sci. Engineering & Public Policy	228.00
11/02/10	ARCH	1501-3000	HAZ I	Institute for Sci. Engineering & Public Policy	299.00
02/10/11	ARCH	501-1500	HAZ I	Institute for Sci. Engineering & Public Policy	228.00
02/24/11	ARCH	1500-3000	HAZ I	Institute for Sci. Engineering & Public Policy	299.00
03/10/11	ARCH	501-1500	HAZ I	Institute for Sci. Engineering & Public Policy	228.00
04/09/11	ARCH	1501-3000	HAZ II	Double Tee	553.00
04/22/11	ARCH	1501-3000	HAZ I	The Snowman Foundation	299.00
04/22/11	ARCH	1501-3000	HAZ I	The Snowman Foundation	299.00
04/23/11	ARCH	1501-3000	HAZ I	The Snowman Foundation	299.00
05/26/11	ARCH	501-1500	HAZ I	ISEPP	228.00
05/14/11	Brunish	101-500	HAZ I	Church of Scientology	156.00
07/11/10	DWTH	101-500	HAZ I	Univera	156.00
01/28/11	DWTH	101-500	HAZ I	Standing Room Only	156.00
01/29/11	DWTH	101-500	HAZ I	Standing Room Only	156.00
04/01/11	DWTH	101-500	HAZ I	Paige Productions	156.00
04/02/11	DWTH	101-500	HAZ I	Paige Productions	156.00
06/25/11	DWTH	101-500	HAZ I	Payam Entertainment	156.00



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09/11/10	EXPO	1 - 100	HAZ I	Rose City Live Model Horse Show	130.00
10/22/10	EXPO	501-1500	HAZ I	Baby Boomer Lifestyle Expo	228.00
10/23/10	EXPO	501-1500	HAZ I	Baby Boomer Lifestyle Expo	228.00
10/24/10	EXPO	501-1500	HAZ I	Baby Boomer Lifestyle Expo	228.00
11/05/10	EXPO	1500-3000	HAZ I	Portland's Largest Garage Sale	553.00
11/06/10	EXPO	1500-3000	HAZ I	Portland's Largest Garage Sale	553.00
04/16/11	EXPO	3001-5000	HAZ II	Portland's Largest Garage Sale	702.00
04/16/11	EXPO	1501-3000	HAZ I	NW's Largest Family Expo - KidFest!	299.00
04/17/11	EXPO	3001-5000	HAZ I	NW's Largest Family Expo - KidFest!	449.00
05/07/11	EXPO	101-500	HAZ II	Columbia Alpaca Breeders Association	280.00
05/08/11	EXPO	101-500	HAZ II	Columbia Alpaca Breeders Association	280.00
01/11/11	KEAU	1501-3000	HAZ I	Film for Thought, Inc.	299.00
07/20/10	NMTH	501-1500	HAZ I	American Assoc. of Physics Teachers	228.00
09/16/10	NMTH	501-1500	HAZ I	Kaiser Permanente	228.00
10/15/10	NMTH	501-1500	HAZ I	Prudential Northwest Properties	228.00
10/16/10	NMTH	501-1500	HAZ II	A Good Smack Productions	332.00
02/23/11	NMTH	501-1500	HAZ I	Oregon Art Education Association	228.00
04/15/11	NMTH	501-1500	HAZ I	Urban Arts Dance Company	228.00
05/04/11	NMTH	501-1500	HAZ I	Jefferson Dancers	228.00
05/04/11	NMTH	101-500	HAZ I	Jefferson Dancers	156.00
05/05/11	NMTH	101-500	HAZ I	Jefferson Dancers	156.00
05/06/11	NMTH	501-1500	HAZ I	Jefferson Dancers	228.00
05/07/11	NMTH	101-500	HAZ I	Jefferson Dancers	156.00
05/07/11	NMTH	501-1500	HAZ I	Jefferson Dancers	228.00
07/10/10	OCC	101-500	HAZ I	Kelli Leistiko	156.00
09/05/10	OCC	501-1500	HAZ I	La Femme Magnifique International Pageant	228.00



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09/14/10	OCC	101-500	HAZ 1	2010 Northwest Apparel & Footwear Material Show	156.00
09/15/10	OCC	101-500	HAZ 1	2010 Northwest Apparel & Footwear Material Show	156.00
09/18/10	OCC	1501-3000	HAZ I	Portland VegFest 2010	299.00
09/19/10	OCC	1501-3000	HAZ I	Portland VegFest 2010	299.00
09/20/10	OCC	1-100	HAZ 1	GNSS Solutions Tutorials	130.00
09/21/10	OCC	1-100	HAZ I	GNSS Solutions Tutorials	130.00
09/22/10	OCC	1-100	HAZ I	The Boeing Company	130.00
09/23/10	OCC	101-500	HAZ I	The Boeing Company	156.00
09/26/10	OCC	101-500	HAZ I	Miss Latin Look International Pageant	156.00
09/29/10	OCC	1-100	HAZ I	DAMA Day 2010	130.00
09/30/10	OCC	1-100	HAZ I	Business Diversity Institute	130.00
10/02/10	OCC	1501-3000	HAZ I	Rose City Bridal Showcase 2010	299.00
10/02/10	OCC	501-1500	HAZ I	Basic Rights Oregon Fall Dinner	228.00
10/03/10	OCC	1501-3000	HAZ I	Rose City Bridal Showcase 2010	299.00
10/06/10	OCC	101-500	HAZ I	Business Diversity Institute	156.00
10/15/10	OCC	501-1500	HAZ I	Home Improvement Show 2010	228.00
10/16/10	OCC	1501-3000	HAZ I	Home Improvement Show 2010	299.00
10/17/10	OCC	501-1500	HAZ I	Home Improvement Show 2010	228.00
10/19/10	OCC	1-100	HAZ I	Association of Climate Change Officers	130.00
11/03/10	OCC	1-100	HAZ I	Gecko Microsolutions, Inc.	130.00
11/16/10	OCC	501-1500	HAZ I	Shoulder to Shoulder 2010	228.00
12/13/10	OCC	1-100	HAZ I	Kitzhaber 2010	130.00
01/15/11	OCC	101-500	HAZ I	Soroptimist Northwestern Region	156.00
02/04/11	OCC	101-500	HAZ I	Marrone Hallinan Event Management	156.00
02/05/11	OCC	3001-5000	HAZ I	Portland Chinese Times	449.00
03/15/11	OCC	101-500	HAZ I	American Red Cross Oregon Trail Chapter	156.00

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03/16/11	OCC	501-1500	HAZ I	American Classic Events, Inc.	228.00
03/17/11	OCC	101-500	HAZ I	American Classic Events, Inc.	156.00
04/15/11	OCC	501-1500	HAZ I	Oregon League of Conservation Voters	228.00
04/16/11	OCC	101-500	HAZ I	Mt. Hood Kiwanis Camp 2011 Auction	156.00
04/16/11	OCC	1501-3000	HAZ I	Stumptown Comics Fest 2011	299.00
04/17/11	OCC	501-1500	HAZ I	Stumptown Comics Fest 2011	228.00
04/21/11	OCC	101-500	HAZ I	Basic Rights Oregon	156.00
04/29/11	OCC	101-500	HAZ I	Youth Advisory Banquet - Mult. Co.	156.00
05/07/11	OCC	501-1500	HAZ I	Stanford University Leading Matters	228.00
05/12/11	OCC	101-500	HAZ I	Senator Jeff Merkley Awards Luncheon/Ashmead	156.00
05/21/11	OCC	101-500	HAZ I	Oregon League of Minority Voters	156.00
06/02/11	OCC	501-1500	HAZ I	United Natural Foods, Inc. - Western Trade Show	228.00
06/03/11	OCC	501-1500	HAZ I	United Natural Foods, Inc. - Western Trade Show	228.00
06/09/11	OCC	1-100	HAZ I	LSVT LOUD Training	130.00
06/10/11	OCC	1-100	HAZ I	LSVT LOUD Training	130.00
06/23/11	OCC	1-100	HAZ I	Locata Pre-ION	130.00
06/24/11	OCC	1-100	HAZ I	Locata Pre-ION	130.00
06/25/11	OCC	1-100	HAZ I	Locata Pre-ION	130.00
06/26/11	OCC	1-100	HAZ I	Locata Pre-ION	130.00
06/27/11	OCC	1-100	HAZ I	Locata Pre-ION	130.00
06/28/11	OCC	1-100	HAZ I	Locata Pre-ION	130.00
					20,532.00

