



4040 Paramount Blvd.
Lakewood, CA 90712
(562)921-5521

Robb Whittaker, P.E.
General Manager

Scott Ota, CPA.
Chief Financial Officer

Board of Directors

SERGIO CALDERON
PRESIDENT

WILLARD H. MURRAY, JR.
VICE PRESIDENT

ROBERT KATHERMAN
SECRETARY

ALBERT ROBLES
TREASURER

LILLIAN KAWASAKI
DIRECTOR

REQUEST FOR QUALIFICATIONS

PROFESSIONAL INSURANCE BROKERAGE SERVICES

Issue Date:
September 14, 2011

Closing Date and Time:

Complete hard copies of each Response must be received before **5:00** PM
Pacific Time on **October 14, 2011**.

Contact person:

Scott Ota
Chief Financial Officer
4040 Paramount Blvd.
Lakewood, CA 90712

Water Replenishment District of Southern California

REQUEST FOR QUALIFICATIONS Insurance Broker Services

Purpose:

The Water Replenishment District of Southern California (the "District") invites qualified Insurance Brokers who possess the experience, capability and expertise in the area of various commercial insurance markets including but not limited to property, general liability, Auto liability and workers compensation, to submit a proposal to serve as a Broker of Record to the District. The purpose of this process is to select the Insurance Agency that can offer the highest quality services to the District at a competitive price.

The District is a water replenishment district formed under the provisions of the Water Replenishment District Act, contained in Sections 60000 et seq. of the California Water Code. The District manages the Central and West Coast groundwater basins located in southern Los Angeles County. The District's service area covers approximately 420 square miles.

District Website: www.wrd.org

Scope of Services:

The District is seeking qualifications for an insurance broker for its general liability, property and workers compensations insurance coverage. In order to implement the above program, the insurance broker will be expected to:

- Assign experienced staff immediately upon proposal acceptance to assess the District's operational risks and provide recommendation regarding the appropriate types of insurance, the levels of coverage necessary to protect the District from reasonable risks, the levels of deductible for each policy to provide the best balance of risk limitation and lower premium and such other factors as the broker shall recommend.*
- Based on the insurance coverage selected by the District, organize, develop, present the District insurance coverage requirements to insurance vendors and obtain price quotes from responsible insurers for that coverage. Evaluate those quotes and present the package of insurance policy terms, condition, and premiums to the District that best reflect the goals and objectives of the District.*
- Represent the District, as directed, in any negotiations with insurers or prospective insurer and other parties regarding insurance matters.*
- Act as the liaison and advocate for the District with underwriters and claims staff.*
- Review contracts for adequacy and compliance with requested coverage and provide feedback as needed regarding management of risks.*
- Issue evidence of enrollment, certificates of insurance, and insurance policies to all insured parties.*
- Issue evidence of insurance as required to third parties.*
- Answer coverage and program questions from the District and/or its consultants or contractors in a timely manner.*
- Monitor Insurance documents of contractors.*
- Be responsible for notifying the District of invoicing of premiums for all outstanding policies to assure that no policy lapses inadvertently.*
- Assess insurance company stability, solvency and service records.*
- Meet with the District at least annually or as requested to audit existing District insurance policies to determine adequacy of coverage and limits, appropriate deductible levels, overlap or gaps in coverage, restrictions in coverage, and notify the District of any new developments in the industry or markets generally that affect the District in any way or that impact the insurance coverage or policies sought by the District.*
- Upon request, provide timely, verbal or written interpretation of coverage.*

- The primary account representative and other account team members for the insurance broker shall be reasonably available to the District and its staff to address questions related to this account.
- Provide such other services related to the insurance coverage as the District may reasonably request.

Current Insurance Coverage

General Liability	\$150,431.00
Property	
Basic	\$36,129.00
Building	11,589.00
Fixed Equipment	23,270.00
Personal Property	1,270.00
Mobile Equipment	\$15.00
Licensed Vehicle (Comprehensive and Collision)	\$2,964.00
Passenger Car	-
4 Light Truck	500.00
1 Van	123.00
All Other	2,341.00
Earthquake Insurance	\$23,969.45
Worker's Compensation	\$22,384.00
Property Deductibles	
Basic Deductible	1,000.00
Mobile Equipment Deductible	1,000.00
Licensed Vehicle Deductible	500.00
Earthquake Deductible	5% Subject to a 25,000 Minimum
Flood Deductible	5% Subject to a 25,000 Minimum
All Other Perils	25,000.00
Benefits	
Property Coverage	
Accounts Receivable	100,000,000.00
Valuable Papers	100,000,000.00
Business Interruption	10,000,000.00
Extra Expense	10,000,000.00
Catastrophic Coverage for Vehicles Garaged on District Premises	100,000.00

Earthquake Coverage	5,000,000.00 + 5,000,00 excess of 5,000,000
---------------------	------------------------------------------------

Term of Contract:

Proposals for a one year agreement are being requested. Upon selection of the Insurance Broker, the District and proposer will enter into an agreement for a period of one year with an option for an additional one year period. All costs will remain fixed for the term of the initial one year term. The contract shall include a 90 day termination clause.

Award of Contract:

The District will award the contract in the manner which will obtain the highest quality professional services at the most competitive price. Proposals will be evaluated using the criteria set below.

Content/Criteria:

Proposals shall include the following information:

1. Describe your firm. Include the legal name and address of the main office and branch locations, number of employees, years in business, and designation of legal entity. Indicate whether your firm operates independently or, if your firm is a wholly owned subsidiary or affiliate of a parent company, identify the parent company. Include whether you are a broker-dealer or other type of financial institution.

Broker must be licensed for insurance coverage relating to General Liability, Property and Worker's Compensation. Include broker license(s).

2. Identify the specific individuals who will be assigned to this engagement, their respective roles, and office location. In brief resumes describe each individual's relevant experience and areas of expertise.
3. Please provide three (3) clients for whom you have provided similar services to those being proposed here. Include a contact name, title, and telephone number for each of these references.
4. Describe the process your company will use to prepare the bid specifications that will be sent out to prospective counterparties. Summarize the bidding process including your role after the bids are taken through to closing on the agreements.
5. Please summarize any additional information regarding your firm that the District should consider in making its decision.
6. A fee proposal. What fee, if any, will your firm receive from the selected investment provider?

Submittal Instructions:

Proposals should be prepared in 8 ½" x 11" format and should not exceed 10 pages. All proposals shall be delivered to the below address, no later than October 14th, 2011 at 5:00 pm (PDT). Fax or email proposals will not be accepted. TWO COPIES SHALL BE SUBMITTED IN A SEALED PACKAGE MARKED "RISK MANAGEMENT & INSURANCE SERVICES". Late submittals may not be considered.

Scott Ota
Chief Financial Officer
4040 Paramount Boulevard
Lakewood, CA 90712
Phone: (562) 921-5521

Effective Period of Proposals:

All proposals shall state the period for which the proposal shall remain in effect, but shall not be less than 90 days from the proposal date.

Right of Rejection:

Notwithstanding any other provisions of the RFQ, the District reserves the right to award the contract to the offeror whose proposal is most advantageous to the District.

Contact Person:

Questions regarding the RFQ shall be in writing and directed to:

Scott Ota

Chief Financial Officer

4040 Paramount Boulevard

Lakewood, CA 90712

Phone: (562) 921-5521

Fax: (562) 921-6101

LETTER OF QUALIFICATION

(To be typed on Respondent's Letterhead. NO MODIFICATIONS MAY BE MADE TO THIS LETTER)

*Attn: Scott Ota
Chief Financial Officer
4040 Paramount Boulevard
Lakewood, CA 90712*

Dear Mr. Ota:

The undersigned have reviewed our Qualifications Statement submitted in response to the Request for Qualifications (RFQ) PROFESSIONAL INSURANCE BROKERAGE SERVICES For Water Replenishment District, dated _____ in connection with the Water Replenishment District's need for Professional Services - Insurance Broker of Record Services.

We affirm that the contents of our Qualification Statement (which Qualification Statement is incorporated herein by reference) are accurate, factual and complete to the best of our knowledge and belief and that the Qualification Statement is submitted in good faith upon the express understanding that any false statement may result in the disqualification of (Insert Name of Respondent).

Insert Name of Respondent

Insert Name of Respondent

Date

Date

Respondent shall sign and complete the spaces as provided above. If a joint venture, partnership or other formal organization is submitting a Qualification Statement, each participant must execute this Letter of Qualification.