

OPAC  
INSURANCE BROKERAGE & ADMINISTRATIVE SERVICES REQUEST FOR  
PROPOSAL  
**ATTACHMENT “A”**  
SCOPE OF SERVICES  
MARCH 3, 2010

**A. GENERAL REQUIREMENTS:**

The selected entity shall be experienced and familiar with major construction projects and shall have full access to the applicable insurance markets, as necessary to evaluate and implement a comprehensive insurance program that will cover the insurance needs of the Project (“OPAC Insurance Program” or “Program”). The Program may include, but not be limited to the insurance requirements described in Attachment B (all of which may be secured on a wrap-up (“CIP”) basis). Professional Liability Insurance (including Owner’s Protective Professional Indemnity), Failure to Complete Coverage, and such other policies and coverage’s, as recommended by the selected Proposer and deemed appropriate by OPAC and City may be considered. The selected Proposer shall also be prepared to make recommendations regarding contingent coverages, as well as the use of a partially or fully integrated risk model. Other services to be provided may include, but are not limited to: performing initial feasibility study to determine comparative benefits of wrap-up program; making recommendations regarding the use of an OPAC or Contractor Controlled Insurance Program (OCIP vs. CCIP); preparing insurance terms and conditions and project manual; assisting OPAC with monitoring and retrieval of bid credits; providing reports to update status of bid credits, claims, claims resolution, and deductible exposure; preparing reports of market conditions; performing projections and analysis of potential insurers; and assisting OPAC’s risk management office, construction manager for the Project, City and other project stakeholders in obtaining answers to technical and other questions requiring special expertise.

**B. SPECIAL REQUIREMENTS:**

The selected Proposer shall perform the following services and any related services as may be required:

1. Provide a detailed analysis of the benefits and disadvantages of an OCIP vs. CCIP vs. traditional insurance approach;
2. Identify and analyze all applicable markets for OPAC’s Insurance Program;
3. Assist in the preparation of appropriate marketing and underwriting information to be submitted to potential insurers and related service companies;

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4. Arrange and be responsible for meetings between appropriate insurance underwriters or service providers and OPAC and City's risk management staff;
5. Advise OPAC and City on the placement of insurance and/or related service quotations from available insurers or providers and the provision of cost projections for all viable proposals;
6. Advise OPAC and City in designing the OPAC Insurance Program specifications and negotiating the most favorable rates and coverages;
7. Provide OPAC staff or designees, on an as-needed basis, training concerning policy forms, reporting requirements, claims reporting and underwriting guidelines;
8. Provide safety/loss control/prevention services;
9. Provide complete claims management services including investigation, reporting and resolution of claims;
10. Provide interface with OPAC's CM@R including coordinating all requirements related to the CIP program;
11. Provide all required staffing to comply with the CM@R's project schedule for registration of construction personnel, interface with safety program, training, contractor and subcontractor interface, MWBE assistance and training and all other related services for an effective OCIP;
12. Provide cost/benefit analysis for on-site vs. off-site location of injury treatment, injury reporting and make recommendations to OPAC initially and throughout program period for location and make-up of an injury treatment facility;
13. Provide other professional or technical services on insurance and risk management issues;
14. Provide contract auditing services to determine appropriate contract price deductions, rating and loss data, payroll reporting and compliance with loss control programs; and
15. Prepare the necessary manuals and handbooks for distribution to each participant in OPAC's Insurance Program, which manuals shall: identify key parties and contact persons; detail policy information for the terms, conditions and procedures applicable to OPAC's Insurance Program coverages; establish procedure and forms for implementing OPAC's Insurance Program; set up claims handling, notification and data management systems; create and

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provide MBE/WBE counseling and education services for MBE/WBE participation; and contain samples of all required forms and certificates.

**END OF ATTACHMENT “A”**