

**ATTACHMENT 12
 OCIP STATEMENT OF QUALIFICATIONS QUESTIONNAIRE**

A. GENERAL

1. General
 - a. Name of Responding Company
 - b. Address
 - c. Telephone
 - d. Corporate Structure

2. Is your organization independently owned or affiliated either as a subsidiary or division of some other organization?

3. List each affiliated internal division or subsidiary corporation that you intend to provide services in response to this RFP and the nature of each service to be provided?

4. If the organization primarily responding to this RFP is a subsidiary of another organization provide the name and the primary business of the parent organization?

5. How long has your organization operated in the State of California?

6. List the names, title, role and number of years of experience in the administration of OCIP programs for each person that will be assigned to this project. Designate a single person as the Account Manager, **who must be resident in California** responsible for the success of the services. (Provide detailed Project Team Organizational Chart and details of the experience of each team member applicable to this project in an appendix to your response)

Name	Title	Primary Role	Years OCIP Experience

7. If this project is awarded to your organization, do you intend to hire additional staff to provide the necessary services? If so, describe the number and type of staff, and clearly indicate these positions on the organization chart.

8. If the project is awarded to your organization, do you intend to retain sub-contractors to provide necessary services? If so, describe the work that will be done by the responding organization, and what will be done by sub-contractors, and clearly indicate these positions of the organization chart.

9. If necessary is your organization willing to place an appropriate staff person at a designated Judicial Council office?
10. Does your organization maintain the following insurance policies with the limits of liability indicated?
 - 10.1 Workers Compensation and Employers Liability
Limit of Liability:
Workers compensation: Statutory
Employer's liability: \$1 million per person
\$1million per disease
\$1 million disease aggregate
 - 10.2 Commercial General Liability
Limit of Liability: \$5 million per occurrence
\$5 million annual aggregate
 - 10.3 Professional Liability
Limit of Liability: \$5 million annual aggregate
 - 10.4 Automobile Liability;
Limit of Liability: \$2 million per accident
11. Will your organization name the State of California, the Judicial Council of California, and their respective elected and appointed officials, judges, subordinate judicial officers, directors, officers, employees and agents as additional insured on the commercial general liability and the automobile liability insurance policies?
12. Will your organization, and your insurers, waive any right of recovery either may have against the State of California and the Judicial Council of California for loss or damage arising out of the services performed?

B. OCIP SPECIFIC

1. What is the premium volume directly related to OCIP insurance programs administered by your organization?
 - a. Of this amount what is the OCIP premium volume associated with construction projects being built in California?
 - b. Of this amount, what is the OCIP premium volume associated with construction projects for:
 - i. Public agencies nationwide?
 - ii. Public agencies in California?

2. Describe the primary service unit that administers OCIP insurance programs within your organization?
 - a. Is the business unit dedicated to OCIP administration?
 - b. Where is the business unit located?
 - c. Who is responsible for the day-to-day operations of the business unit?
 - d. How does the business unit interface with the Account Manager in delivering the required services?
3. If the OCIP administration business unit is not based in California how does it interface with the organization's California based office(s) in providing the services necessary for a successful project?
4. Describe how your organization will go about designing an OCIP program for the Judicial Council to include the following:
 - Architect and engineer contract language
 - Construction Manager at Risk, Design-Build, or Design/Bid/Build form of construction contract insurance language
 - Sub contract insurance language
 - Insurance program specifications
 - Insurance market identification and validation
 - Insurance marketing process
 - Insurance market financial security assessment
 - Contractor enrollment process
 - Ongoing program administration
 - Loss control and claims management program
 - Program close out
5. List examples of projects (no more than 10 projects) that illustrate your organization's qualifications for developing and administering an OCIP of the scope and size indicated in this RFP. The projects should be relevant to the court or institutional buildings of similar complexity to those indicated Attachment 13 that have been completed within the last 5 years, or are ongoing, and demonstrate the broker's ability and experience to successfully complete the subject OCIP. Special emphasis should be placed on programs where new construction projects at diverse locations are continually added to the OCIP.
6. For each project listed in response to B.5 above provide as a reference the name of an owner's representative that can, and is willing to, respond to the efficacy of the OCIP developed for that owner.

7. Provide a description of your organization's process to evaluate the efficacy of an operating OCIP, and to make recommendations for change in insurance policy and/or program terms and conditions during the course of the OCIP program.
8. Describe how your OCIP team will communicate with the Judicial Council. Include within your description, with as much specificity as possible, your organization's requirements for support from:
 - The Judicial Council, Facilities Services office, Risk Management Unit,
 - The Judicial Council, Facilities Services office, Project Management Unit,
 - The architect/engineer,
 - The construction manager/general contractor,
 - Each subcontractor.
9. Describe the metrics of the information system that your organization uses to administer an OCIP.
10. Describe how your organization will work with the Judicial Council to develop preconstruction project hazard assessments and detailed risk registers for each project enrolled in the OCIP.
11. Describe how your organization will work to assist the Judicial Council and its contractors to design and maintain a safe construction project, including commitment to staff the loss control service necessary for the success of the OCIP.
12. Describe your organizations resources and process to provide claims management, and conduct claims reserve audits.
13. Describe, in your opinion, the primary obstacles to a successful OCIP.
14. Describe what factors in your experience has led you to believe are the most important to ensure the success of an OCIP.
15. Describe how your project team will work to overcome the identified obstacles to a successful OCIP, to ensure the success of the OCIP, and to close the OCIP within a reasonable time after the completion of all construction work in progress.

C. COMPENSATION/PAYMENT

The Judicial Council is seeking a broker that will perform the services on a fee that is paid by the Judicial Council.

The broker agrees to provide all of the Services required for the successful development, implementation and administration of the OCIP, at the fees indicated below:

1. Contract Amount

- A. Compensation to the Proposer will be in the form of a Firm-Fixed Price, Not to Exceed net of commission, with no contingent or any other type of commission. The Proposer will obtain insurance quotations net of commission. The Firm Fixed Price paid to the Proposer shall include all applicable taxes. Any additional taxes that are not included remain the responsibility of the Proposer.
- B. Commission or Other Fees: Proposer **shall not** be entitled to receive any Commissions or other fees payable from insurance carriers for the placement of the insurance coverage and safety services. Proposer shall divulge all such amounts received by Proposer upon the request of the Judicial Council. Proposer's total compensation for the placement of workers' compensation insurance and primary and excess general liability insurance, safety and administrative The total compensation received by the Proposer shall be from the firm fixed price as agreed with the Judicial Council; there will be no other source of payment for the Judicial Council OCIP services
- A. Travel Expenses: The Judicial Council **will not** reimburse travel expenses;
- B. Other Expenses: The Judicial Council **will not** reimburse for non-travel, out-of-pocket expenses.
- C. The Judicial Council may withhold ten (10%) percent of each invoice until receipt and acceptance of the goods or services procured. The amount withheld may depend upon the length of the project and the payment terms provided for in the Standard Agreement.

Signature: _____ Date: _____

Print Name and title _____

End of Attachment B

RFP No.: FSO-2017-21-HN
RFP: Owner Controlled Insurance Program