



MAY 7, 2024

Jefferson Parish Government

SOQ NO. 24-010

RESPONSE TO REQUEST TO PROVIDE
INSURANCE PRODUCER OF RECORD
FOR INSURANCE PROGRAM



Gallagher

Insurance | Risk Management | Consulting

A. COVER LETTER:

Containing a summary of the Person or Firm's ability to perform the services described in the SOQ and confirming that Person or Firm is willing to perform those services and enter into a contract with the Parish. The letter shall be signed by a person having authority to commit the Person or Firm to a contract. If Person or Firm is an agency, corporation, partnership or other legal entity, the president, vice-president, secretary or treasurer, or an authorized agent shall sign the Qualification Submission. Satisfactory evidence of the authority of the person signing for the agency, corporation, partnership or other legal entity shall be attached to the Qualification Submission.

On behalf of Arthur J. Gallagher & Co. ("Gallagher"), we thank you for the opportunity to respond to Jefferson Parish Government's Request for Proposal for Insurance Producer of Record for Insurance Program. We affirm that we are willing and able to perform the scope of services and will exceed the qualifications and expectations outlined in the SOQ. Since our founding in 1927, Gallagher has built our reputation upon continued expertise and a deep understanding of our clients' specific needs, in this case public sector, which we use to tailor all of our risk management solutions. 25+ years ago, Gallagher's leadership made a decision that changed how the company does business. Gallagher moved away from the usual broker approach of "generalists" and instead began driving specialists, creating national sectors and related resources (loss control, claims advocacy, etc.). As a result, Gallagher excels in its 28+ niches and writes more public sector premium than any other broker worldwide.

Nancy Sylvester, CPCU, ARM-P, is the team lead. She has the largest book of property business in our region and the second largest book of property business in Gallagher's overall U.S. operations. She has an extensive footprint in the global marketplace and includes not only property but casualty lines. Because of her book, she has access to C-Suite individuals in the marketplace. Her role is to open the doors to drive direct underwriting relationships between Jefferson and the markets.

Nancy is the team lead on accounts such as the **Port of New Orleans, the New Orleans Convention Center, University Medical Center (NOLA), LSU and the State of Louisiana**. She places property and liability coverages throughout the U.S. primarily for public sector clients such as the **City of Lake Charles, Texas State University System, Calcasieu Schools, Jefferson Davis Parish Police Jury, Mississippi Institutions of Higher Learning, Texas A&M University, etc.** Her background includes the former role of Managing Director of Gallagher's public sector practice which she recently vacated in order to take on the role of National Director with respects to Federal Disaster recovery for public sector business.

Teamwork – Managing the risks that confront Jefferson Parish Government requires a multi-disciplinary team whose members understand the implications of new and evolving risk trends. Your local Louisiana team backed by a team of over 52,000 colleagues around the globe has experience developing forward-thinking risk management programs with organizations like yours. It is this legacy that fuels our success, by marshalling our vast experience and resources for the many clients we serve. Jefferson also has a need for an amazing claims advocate. We include more information on this topic throughout our response.

Proficiency – As one of the leading public sector (government) brokers in the world, Gallagher's Public Sector Practice has extensive experience designing solutions for nearly every variety of client and the challenges they face – including those experienced by Jefferson Parish Government. **Nancy's property book is valued at over \$75 Billion Total Insured Values across the U.S., mainly located along the Gulf Coast. She has Gallagher's largest property footprint in London within the Southern region of the U.S. Gallagher Public Sector places over \$2 Billion in public sector business.** Why is this an important fact? Six words – experience, leverage and global market relationships.

Ingenuity – We are proud to stand apart from the competition. By working with us, Jefferson Parish will experience Gallagher's unique way of approaching your risk management needs to find the best solutions. It is not uncommon for us to create a bespoke solution for a client that hasn't been seen before in the industry. More on this topic is included throughout our response as well.

No broker writes more public sector business in the U.S. or the State of Louisiana than Gallagher – the difference is double digit. No broker has a bigger Louisiana footprint in terms property TIV placed or number of employees specifically tied to public sector risk management. The globe may be our insurance marketplace to leverage for Jefferson, but Louisiana is our home. We know its beauty and conversely its perils. We understand the emotional and physical toll a storm creates and the importance of an advocate standing side by side to move the claim payments and recovery process along. The references we provide will attest to this. More about the need for strong broker assistance following a Named Storm follows. Two examples, with references, highlight our work with clients in recent storms. With a proficient team fully committed to strong ethics, teamwork, and ingenuity, we remain focused, energized and ready to anticipate any challenge you may face. Some brokers – are just brokers. We partner with our clients on every level as our references will attest. Thank you for your consideration.

Respectfully submitted,



Nancy Sylvester, CPCU, ARM-P
Area Executive Vice President



William Jackson
Area President

Secretary's Certificate

Arthur J. Gallagher Risk Management Services, LLC

I, Donna Jenner, do hereby certify that:

1. I am the duly elected and acting Secretary of Arthur J. Gallagher Risk Management Services, LLC (the "Company") a limited liability company duly organized and existing and in good standing under the laws of the State of Delaware, and as such Secretary, the undersigned has custody of the records of the Company;
2. In such capacity I have access to and am familiar with the corporate records of the Company; and
3. William J. Jackson, is a duly elected and qualified Area President of the Company and is vested with full power and authority in such capacity to execute contracts and agreements on behalf of the Company as set forth in the First Written Consent of the Sole Member dated January 1, 2023 attached hereto as Exhibit A.

IN WITNESS WHEREOF, the undersigned has set her hand and affixed the seal of this corporation this 27th day of November, 2023.


Donna Jenner
Secretary



B. TABLE OF CONTENTS:

Organized in the order cited in the format contained herein including the Attachments.

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C. PERSON OR FIRM QUALIFICATIONS AND EXPERIENCE:

The Person or Firm must demonstrate its experience at providing services similar in nature and complexity to the project outlined in this request for Statements of Qualifications. This includes, but is not limited to, evidence of the following in the Submission:

(1) Professional training and experience as related to the scope of work:
Specific to Louisiana public sector business, we ensure the majority of the public sector risks in the state - including the actual State, the Superdome, the New Orleans Convention Center, the Port of New Orleans, multiple parishes, cities, schools, public housing, most universities, etc. The team assigned to Jefferson includes experience as follows: two former public sector risk managers, two attorneys (serve as a resource, assists with third party risk transfer, etc.), Gallagher's Managing Director of U.S. cyber risk management, two Senior claims advocates, Gallagher's Public Sector National Director Disaster Recovery, public sector focused loss control and more. We know Louisiana public sector business from the inside and out. We are not generalists. We understand FEMA procurement needs (and teach it), Obtain and Maintain, all types of claims, Workers Compensation, law enforcement, public official liability challenges, marine risks, etc. We TEACH Title VII and Title IX to those clients who ask us to do so. (The State of Louisiana did ask, and we provided the training about two weeks ago.) We understand that Jefferson Parish's exposure includes not only Title VII requirements, but Title IX as well. Point being? Average brokers do not bring this to your table. We will.

And more important to Jefferson, the people on your team assists in claims from day one. In the recent 2020-2021 storms, we requested early upfront payments (hand delivered a few of them), challenged markets when necessary and stood up against those markets who were not living up to their end of the contract. Examples of this will follow.

PUBLIC SECTOR EXPERIENCE

Gallagher established our commitment to public sector in 1999, when we formed our dedicated practice group, which now has more than 500 risk management professionals from 40 branches supporting 10,900+ clients. We are invested in the industry and relevant associations, and have been for more than 30 years. Gallagher is the preeminent provider of brokerage and risk management services in the public sector. Our expertise and knowledge is unparalleled in the industry. Gallagher is consistently recognized by key professional associations for our commitment to the public sector and expertise in risk management. **Members of the team assigned to Jefferson are interviewed by industry publications and speak often across the U.S. at state and national conferences on various topics related to public sector risk, managing the property markets response to your data, upcoming NIST requirements and more. We support the Police Jury Association and belong to the following organizations: PRIMA, RIMS, CPCU Society, ASBO, URMIA and others.**

10,900+

Global clients

500+

Global professional experts

\$2.7B+

In annual premium

(2) Capacity for timely completion of the scope of work, taking into consideration the person's or firm's current and projected workload and professional and support manpower;

Your team has a manageable workload and affirms we have capacity for timeline completion of the scope of work. A copy of our service standards are below.

Technical Service Standards	Within:
Return phone calls	Same day (within 24 hours)
Issue invoices and related documents	8 work days of effective date
Incorporate policy changes	3 work days of receipt
Issue certificates*	48 hours of receipt or as needed / *2 hours for rush requests
Process premium-bearing endorsements	8 work days of receipt from carrier
Process non-premium-bearing endorsements	10 work days of receipt from carrier
Process audits	7 work days of receipt from carrier
Check policies	60 work days of effective date & deliver within 10 work days
Issue auto ID cards	

(3) Past and current accomplishments, for which references from clients or former clients may be considered

TEAM ACCOMPLISHMENTS

Broker and Risk Management Consulting Services
During Nancy Sylvester's career over the last 30 years, starting first as a public risk manager, then a risk manager for a carrier who only insured public sector, and finally as broker. She has completed the scope of work described in your request over and over again and

provided consultative services to her clients including: risk management services, policy and procedure review, data improvement, written manuscript policies, developed new insurance products as well as:

- Integrated risk management
- Disaster Response & Recovery, Emergency Preparedness and Business Continuity (Pre-procurement focus)
- Insurance Requirements for Outside Contractors, Vendors and Premises Users
- Fleet Safety
- Property Conservation
- Third Party Use of Facilities contracts
- Third Party Risk Transfer
- Contract Review
- COI review assistance
- Claims management assistance
- Coverage reviews
- Modeling reports

Nancy speaks regularly at national and state conferences on the topics of risk management, FEMA, insurance and leadership.

Nancy is the recipient of multiple awards for her work in the public sector. She received the Power Broker Award presented by *Risk & Insurance* magazine in 2012, 2013 and 2019 in the education category and in 2014 and 2016 in the public sector category.

Nancy has received a Leadership Award from Liberty Mutual and *Risk & Insurance* magazine. She was named Women to Watch by *Business Insurance* magazine. She was president of Louisiana PRIMA 8 out of 12 years. She served on National PRIMA's board for a period of time.

Success stories concerning property:

- 1) Vermilion Parish School Board. Debbie Crosby, claims advocate, worked tirelessly to assist this client with Hurricanes Laura and Delta. She reviewed 100% of the loss data as it developed, communicated with the adjuster to discuss the insured's position. When that failed, she went directly to the markets to fight the fight. Long story short, this client had a successful result which looked much different at the end of the process than originally indicated by the carriers. Reference: Eric Johnson, CFO. Eric.Johnson@vpsb.net. Phone: 337-898-5705.
- 2) City of Lake Charles. Hurricanes Laura and Delta. Nancy Sylvester and Debbie Crosby. Nancy was on the ground following the loss, meeting regularly with client staff. She visited sites, took photos and documented the day to day environment/changes in the loss and shared internally. Their carrier had refused to honor the adjuster which had been assigned to the City. Debbie reviewed data, found multiple deductible mistakes, scope of work challenges, etc. Another very long story short, Nancy and Debbie were part of the City's team that stood up against the carrier, armed with facts. The client had a successful result. Reference: David Morgan, J.D., Dmorgan@ssvcs.com 337-493-7274.
- 3) Archdiocese of New Orleans. Tornado loss. The loss seemed finished. Debbie did a claims audit and in doing so has managed to find another \$1M due to the insured. The finding was unexpected. Reference: Lee Eagan 504-810-5838.

Success stories other than property:

- 1) Years ago, following the Virginia Tech shooting, Loyola University (still a client) wanted to purchase coverage for Business Interruption that occurred as a result of a violent event. As B.I. is driven by property damage, standard property policies don't pay for B.I. brought about by emotional damage. (Consider that Sandy Hook's property carrier paid less than \$40K in damages.) It took several months, but we developed a new line of coverage, underwritten by Lloyds that does exactly what Loyola wanted. The product is still in the marketplace today. The reference here is the risk manager in place at the time that requested the product. He has since retired. Ric Bell 504-214-1220.
- 2) Led by Joey Sylvester, Recognizing the need to address core cybersecurity functions for a Louisiana public entity, Gallagher brought a solution to inexpensively offer vulnerability management, employee training, and threat intelligence using a Gallagher specific offering at a fraction of the cost in the commercial cybersecurity marketplace. This solution has helped them fill a need in core defenses but also assisted with the underwriting process as the cyber risk profile was positively impacted in the application process, resulting in a successful and competitive renewal. To keep this situation confidential, the client's name is not being provided.

Louisiana Public Sector Expertise:

- We work with over 250 Public Sector and K-12 Education clients, placing \$180M+ in program volume with our carrier partners.
- **Total public sector and non-profit property TIV placed in Louisiana by the team responding to your RFP exceeds \$100 Billion. This is more than any other broker who will be responding to your RFP. No exception.** Why is this important?
 - Leverage and relationships.

(4) Past performance by the person or firm on public contracts;

SIMILAR PROJECTS

Partial List of Public Entity Clients Serviced by Gallagher Louisiana

East Baton Rouge Parish School Board	Lafourche Parish School Board
Cameron Parish School Board	Livingston Parish School Board
Calcasieu Parish School Board	Livingston Parish Sheriff's Office
Central Community School System	Archdiocese of New Orleans
City of Baker School Board	Louisiana State University
Jefferson Davis Parish School Board	St. John The Baptist Parish School Board
Calcasieu Parish Sheriff	EVERY Public University in the State of Louisiana
State of Louisiana	New Orleans Convention Center
St. Tammany Parish School Board	IHL (approximately 12 Mississippi universities)
Texas A&M	Texas State University System
City of Lake Charles	Louisiana Housing Council (Public Housing Authority pool)
Port of New Orleans	Port of St Bernard
Port of Lake Charles	Jefferson Davis Parish Police Jury
Terrebonne Parish School Board	Vermillion Parish School Board
Tangipahoa Parish School Board	Rapides Parish School Board

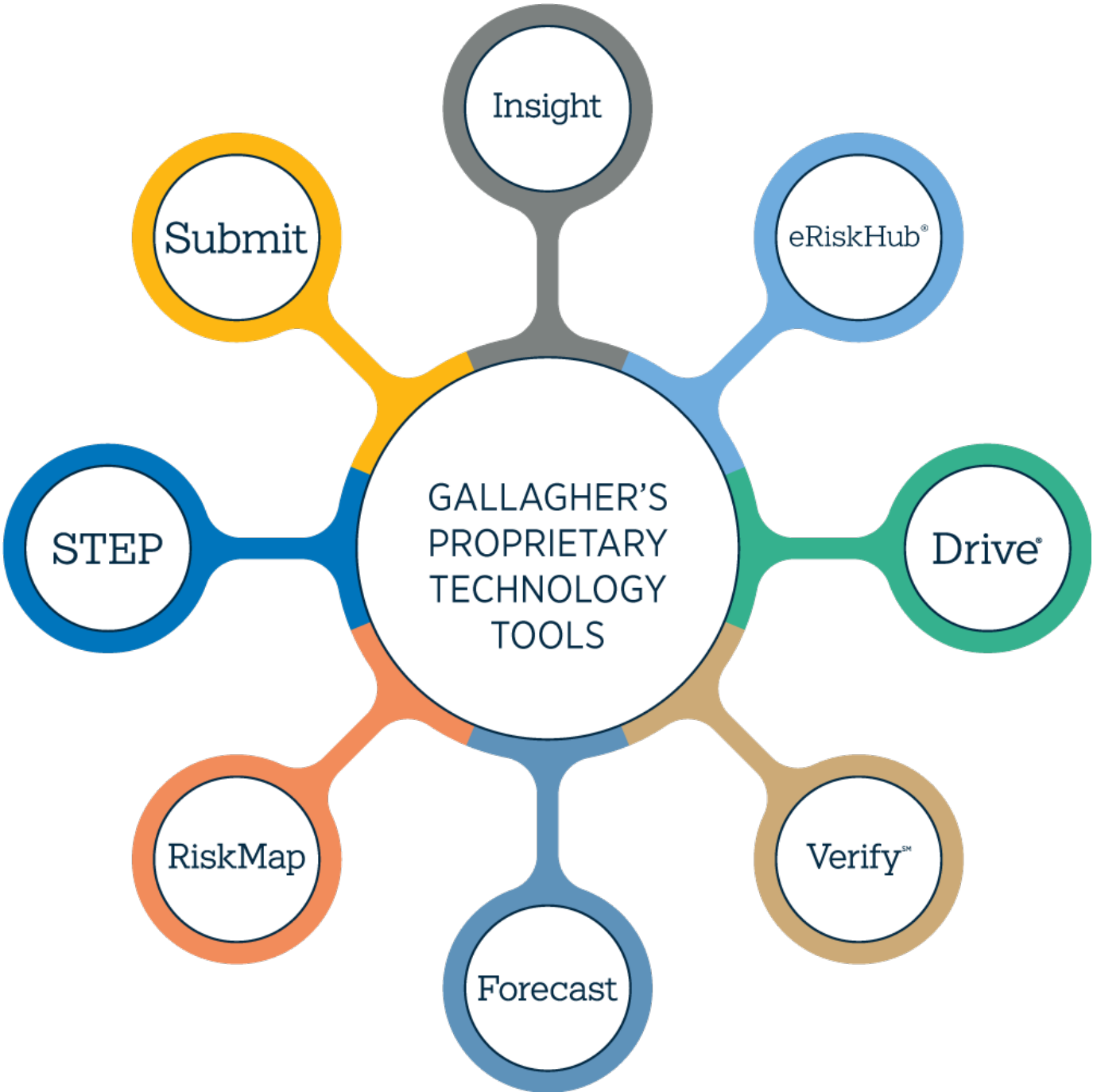
(5) The size of the firm based on the number of personnel, as related to the project requirements and/or scope; and

Your local Louisiana Gallagher Team is located right down the road. That team is backed by a public sector practice group and 52,000 employees globally.

(6) Technology Solutions

Gallagher has a list of proprietary technology solutions that can be provided to Jefferson Parish Government. For the sake of space, we have included a snapshot below. Additional information on the below proprietary tools have been provided in response to the attachments in the following section regarding technology. Each of the below online tools will be brought to Jefferson. Though all are important, one jumps out to most clients. When bad weather is pending, or has recently passed, Gallagher Forecast will give Jefferson information specific to your assets in terms of anticipated risk, snapshot of the impact of the “hit” within hours following the event and more. Gallagher Submit is another popular solution. It streamlines the renewal application process to an efficient, easy on-line system. The applications are pre-filled based on basic data from the prior year. The client completes/reviews the rest of the information on-line, hits send – and done.

Archipelago is not shown below, however we will sign Jefferson up for Archipelago at our cost. It is an SOV management system. It provides RMS and AIR modeling, highlights areas of improvement in your SOV and is a one stop submission link for underwriters. All information related to your submission is in one link. The underwriters can take your SOV and maneuver it to see what they want. It has the ability to hold photos, engineering reports and more – assigned to specific buildings. Underwriters love the program.



Complete and duly execute Attachments C, D, E, & F as per the SOQ instructions. Failure to complete Attachments may result in your submission being rejected and receiving no further consideration.

We have completed these attachments as instructed.


ATTACHMENT C
RENEWAL TIMETABLE

The successful Producer(s) will be expected to adhere to the following renewal time table. Please confirm your willingness to comply below.

ACTIVITY	COMPLETION DAYS PRIOR TO RENEWAL
Initial Planning Session	150
Request for Conceptual Qualification Submission to Producer	120
Meeting between Director & Producer	110
Producer compiles data for Quotations	105
Information is released to Companies	95
Quotations received by Producer	60
Quotations submitted to Director	45
Quotations Analyzed	30
Coverage Selected	20
Binders Issued	15
Certificates of Coverage Issued	10
Renewal Date	0

I / We agree to adhere to and comply with the above renewal timetable in servicing the Parish's insurance program.

Name of Firm: Arthur J. Gallagher Risk Management Services, LLC


Signature

4/25/24
Date

ATTACHMENT D

INSURANCE PRODUCER INITIAL QUALIFYING QUESTIONNAIRE

Please note, if applicable, all sub-Producers that will be used on this project must complete this form.

Identifying Information:

Name of Firm: Arthur J. Gallagher Risk Management Services, LLC

Address: 111 Veterans Memorial Blvd., Suite 1130

City: Metairie State: LA Zip: 70005

Principal of Firm: William Jackson, Area President

E-mail Address: William_Jackson@ajg.com

Primary Telephone: (504) 378-4604

Firm's Qualifications:

Date Established: 1927

Total Number of Employees: 52,000

Total Number Louisiana AJG employees: 550

Total Number Baton Rouge AJG employees: 250

Total Number Metairie AJG employees: 130

Number of Louisiana employees who will be working on this project 8

Location of office from which this account will be serviced: Baton Rouge, LA & Metairie, LA

Describe the ownership of your Firm. Publicly Traded Company

Are you licensed in the State of Louisiana: X YES NO

Louisiana Producer Number: 266634 Expiration Date: 11.30.2024

Name of licensed Principal(s): Nancy Sylvester, CPCU, ARM-P

Have you handled an account within the last 10 years with a total cost of risk in excess of \$5,000,000? Yes

Do you have experience in providing producer services similar to those outlined in the SOQ? Yes

Do your commercial lines accounts generate an annual premium volume of at least \$10,000,000? Yes

For how many Louisiana Public Entity clients within the last 10 years do you currently provide or have you provided Producer of Record Services? 182 public entity clients in the last 10 years, including 110 housing authorities.

What are the locations of any branch offices/affiliates that will assist in servicing this contract? (list location & affiliate name)

Metairie and Baton Rouge

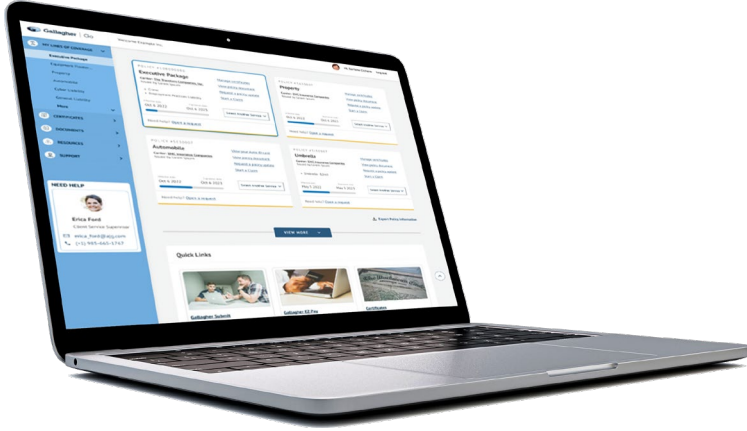
Please provide a narrative addressing the following:

A. Please describe what technology will the FIRM utilize while servicing the Parish?

Gallagher Service Portal

(GALLAGHER GO)

The ability to effectively manage certificates of insurance for our clients continues to be a priority. We provide our clients with two options for issuance: your Gallagher service team or the Gallagher Service Portal.



Gallagher will always be available to issue certificates on your behalf. Requests can be made via e-mail or telephone, and normal processing time from receipt of a request is within 12 hours. Rush certificates can be processed in two hours. We also know that time is a priority for our clients, and many don't have two or more hours to spare waiting on certificates to circle back. Gallagher offers the Gallagher Service Portal, allowing clients to create, manage, and send certificates of insurance on their own. Clients can be authorized to issue certificates when needed, giving your team full access to process certificates whenever necessary. The Gallagher Service Portal allows you to provide immediate issuance, dramatically reducing wait time and keeping your

operations moving.

Additionally, as part of our stewardship process, Gallagher will provide a detailed Excel sheet during the renewal process. This sheet lists the specifics of all the certificates produced in the previous year such as the certificate holder, description of operations, coverages provided, and more. We will send this to Jefferson Parish for review approximately 90 days before renewal. From there, we can start the process of any certificates you already know need to be renewed for the upcoming term. This due diligence allows us to reduce wait times, address any issues that may arise before it's too late, and ultimately provide for a much smoother transition.

How Does Jefferson Parish Access The Gallagher Service Portal?

Manage certificates of insurance, issue an auto ID card, request changes to your policy, and review policy and coverage information any time.

1. To obtain access to the portal, email Gallagher.CSR24.Portal.Support@ajg.com
2. Visit Gallaghergo.csr24.com once you receive the confirmation email
3. Enter your login ID and password.

From this portal Jefferson Parish would be able to access the following features:

- Review/Update Policy Info
- Review/Update vehicles
- Review/Update drivers
- Review/Update locations
- Get a certificates
- Get Auto ID Cards
- Reference Guides
- Questions – contacting your service manager directly

Gallagher Submit

The renewal process can be a tricky, time-consuming headache. We aim to change that. Gallagher rolled out a digital platform system called Gallagher Submit. Linked through our preferred software program, EPIC, Gallagher Submit is a portal that can safely house all the documents required for an upcoming renewal in one secure location.

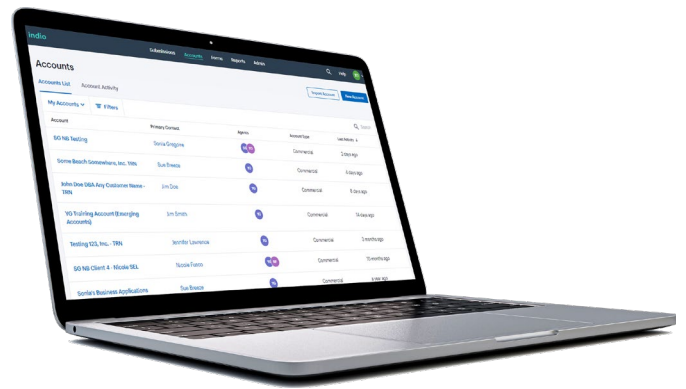
When you're dealing with numerous documents – statements of applications, schedules of renewals, SOVs, auto schedules, etc. – it can be easy for things to get lost in the line of communication of back-and-forth e-mails, especially if there are multiple risk managers or client service members involved.

Gallagher Submit allows you and your Gallagher team to work simultaneously during the renewal process while housing all of your renewal documents in one place. Each user receives a unique log-in that they can use to view, upload, and sign documents, then send those documents directly to the carrier. Your Gallagher service team can set up additional individuals if more people need access. A unique log-in and dual identification can be created to provide extra security and peace of mind.

The Gallagher Submit platform is intuitive and helps organizations:

- Save time
- Reduce manual data entry
- Avoid costly follow-ups
- Secure sensitive data

The best part of the portal is that it allows smoother renewals each year. Once everything is uploaded and logged, the process becomes about annual updates and changes, not starting from scratch. The true benefit is the ease of access year after year, cutting down on time, cost, and headaches.



Gallagher Drive

Gallagher Drive is Gallagher's platform of data and analytics that analyzes market conditions, claims history and industry benchmarks to give clients and carriers data to optimize risk management programs. Together with **CORE360®**, Gallagher Drive creates meaningful insights to help clients identify their total cost of risk.



BENCHMARKING SERVICES

Our platforms allow you to compare your insurance program structure against industry peers to help you make more informed purchasing decisions around your coverages, your limits and potential exposures.



PLACEMENT ANALYTICS

Gallagher has decades of experience working with carriers complemented with unique trade data to help ensure you optimize your insurance panel along with your total cost of risk. We use these analytics to continually review markets to ensure risk is being managed with the optimal carrier.



CLAIMS ANALYTICS

Comparing our clients' claims data and comparing it to those of similar companies allows us to advise clients how to best manage their loss control efforts to reduce risks and overall cost.



CONSULTING SERVICES AND SOLUTIONS

Our comprehensive suite of data visualizations and dashboards provide a visual story of the factors that comprise your specific total cost of risk. Our analytics consultants can show how they work together to deliver the performance your organization requires.

Our analytics offerings will optimize your programs through the effective use of third-party and Gallagher data. Our clients see the results because of our market relationships, trade data, and ability to provide relevant insight into their industries. The four Gallagher Drive



BENCHMARKING SERVICES

categories above are expanded upon in greater detail below.

Gallagher's comprehensive benchmarking tool provides your team with the ability to benchmark many facets of your insurance program and see how your current limits measure up against your peers with a similar risk profile.

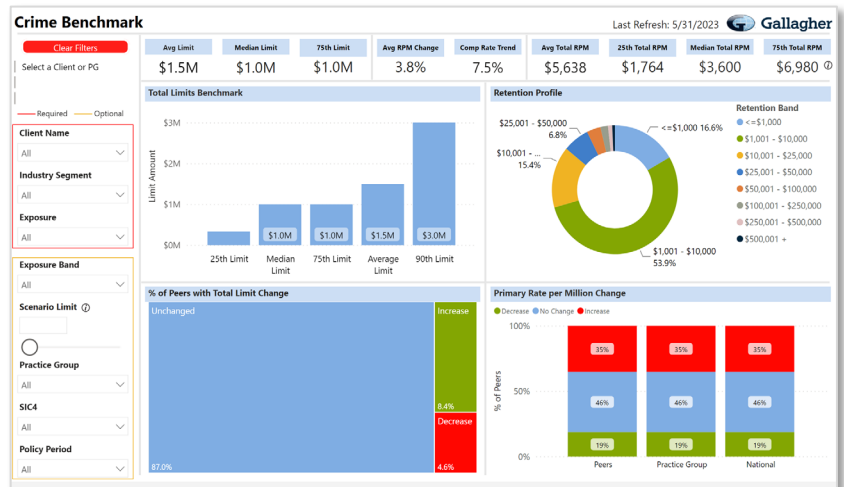
The tool produces a report based on the user's selections that outlines the results and gives Gallagher's recommendations. We show high-level loss information of what others within your industry experienced and if their current limit is adequate.

Gallagher Drive limit benchmarking is available for:

- Auto Liability
- General Liability
- Umbrella
- Cyber
- Crime
- Directors & Officers
- Workers' Compensation and more

We can further customize our benchmarking services to you by:

- Additional lines of coverage
- Rate benchmarking
- Retention benchmarking
- Enhanced peer group identification criteria through exposure metrics (example. payroll, area, units) and more precise exposure bands





PLACEMENT ANALYTICS

Drawing on Gallagher's trade data, we identify which carriers have an appetite for your risk and their average premium rate. Using this data, we optimize your insurance panel while also seeking to optimize your total cost of risk. Our data-driven approach ensures we identify the top carriers with the best solutions for your risks.

SmartMarket

At the core of serving our clients is understanding their unique needs and matching those requirements with the most appropriate insurance company. SmartMarket is our proprietary platform that supports this critical function. By allowing our insurance company partners direct visibility into your needs, they are able to select those businesses and risks that most directly match their available capacity. This creates a more competitive marketplace and removes much of the guesswork often found in the broking process. **SmartMarket enables us to:**

Present our clients with more competitive options

Simplify the marketing process

Better align our clients with the most appropriate insurance company



CLAIMS ANALYTICS

CASUALTY ANALYTICS

Our casualty analytics use Gallagher's proprietary data as well as industry best practices to benchmark your program. This process allows us to identify areas of strength and opportunities for improvement. We also help benchmark your losses against our industry-leading claims database to make specific recommendations on your risk management program. In analyzing your data, we show claim trends within your loss history.

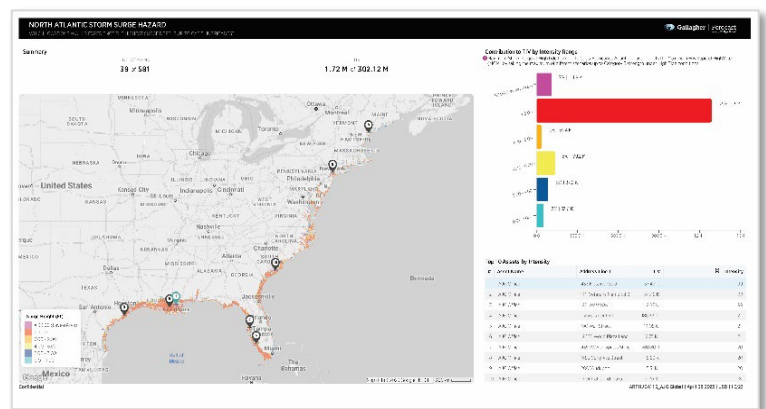
PROPERTY ANALYTICS

Gallagher Forecast

As weather patterns continue to change in frequency in severity, Jefferson Parish needs a tool to stay informed. Gallagher Forecast is a complimentary online platform that transforms your property Statement of Values into actionable insights and catastrophe risk analytics. Forecast reports provide visual representations of data that identify property/locations that are most exposed to catastrophic losses, including wind, earthquake, flood, hail, and storm surge.

Gallagher Forecast offers the following value to Jefferson Parish:

- **Real-Time Alerts** Receive real-time alerts for impending catastrophic events. Make more informed decisions about distribution of resources before, during, and after an event.
- **Better Understanding of Property Exposures** and potential impact of events on your portfolio through benchmark reports, scenario analytics developed based on historical events, and the year over year comparison report.
- **Elevated Market Submissions.** By providing Gallagher Forecast data, your Gallagher team is able to determine technical price for program layers before we visit underwriters — allowing for successful negotiations with underwriters to provide broader coverage and better renewal premiums.





Gallagher Drive Client

Gallagher Drive can collaborate with clients to develop customized dashboards to help monitor and track risk management program performance. Our Gallagher Drive Client dashboards empower the user to manipulate their data for various uses. The dashboards are powered by Microsoft Azure and created using PowerBI.

Some of these dashboards include:

- Claims program benchmarking utilizing Gallagher's proprietary data and metrics
- Identification and tracking of key claims cost drivers, nature of injury, injury cause, body part, occupation
- Tenure & Lag Time analysis
- Large loss analysis & Loss Stratification
- Yearly trends



Gallagher Drive Client enables clients to identify major cost drivers in their programs to better manage their total cost of risk, analyze and identify risks and areas of improvements, and property forecast financials.

Gallagher Drive also offers custom consulting projects to address clients' analytical needs to help them achieve both their short- and long-term risk management goals.

RISK MANAGEMENT OPERATIONS

- Program structure and strategy
- InsureTech vendor selection

SERVICES OFFERED

- Claims trending and scoring
- Fraud prevention

CUSTOM ANALYTICS

- Benchmarking services utilizing Gallagher and third-party data sources
- Financial analysis
- Statistical modeling and forecasting
- Data compilation and cleansing
- Premium analysis
- Assist in setting up analytics programs

We will utilize our CORE360® cost drivers in unison with Gallagher Drive Client consulting services to minimize your insurance premiums, review and/or redesign your program structure, and focus on loss prevention & claims. This will lower Jefferson Parish's TCOR by implementing programs that will increase safety, minimize losses, and mitigate claims.

a. How will this technology help to market the Parish's insurance program?

TECHNOLOGY TO ASSIST IN THE MARKETING PROCESS



Gallagher Submit allows you and your Gallagher team to work simultaneously during the renewal process while housing all of your renewal documents in one place. Each user receives a unique log-in that they can use to view, upload, and sign documents, then send those documents directly to the carrier. Your Gallagher service team can set up additional individuals if more people need access. A unique log-in and dual identification can be created to provide extra security and peace of mind.

The Gallagher Submit platform is intuitive and helps organizations:

- Save time
- Reduce manual data entry
- Avoid costly follow-ups
- Secure sensitive data

The best part of the portal is that it allows smoother renewals each year. Once everything is uploaded and logged, the process becomes about annual updates and changes, not starting from scratch. The true benefit is the ease of access year after year, cutting down on time, cost, and headaches.



SmartMarket is our proprietary platform that supports this critical function. By allowing our insurance company partners direct visibility into your needs, they are able to select those businesses and risks that most directly match their available capacity. This creates a more competitive marketplace and removes much of the guesswork often found in the broking process. **SmartMarket enables us to:**

- Present our clients with more competitive options
- Simplify the marketing process
- Better align our clients with the most appropriate insurance company

b. How will this technology assist the Parish's Risk Management Department implement, monitor, and administer its property and casualty insurance program?

TECHNOLOGY DASHBOARDS & MOBILE ACCESS

Each of the technology tools mentioned above consist of custom dashboards and mobile access. These dashboards can be tailored to Jefferson Parish Government and can include:

- Claims program benchmarking utilizing Gallagher's proprietary data and metrics
- Identification and tracking of key claims cost drivers, nature of injury, injury cause, body part, occupation
- Tenure & Lag Time analysis
- Large loss analysis & Loss Stratification
- Yearly trends



c. How will this technology make the Parish insurance program more efficient?

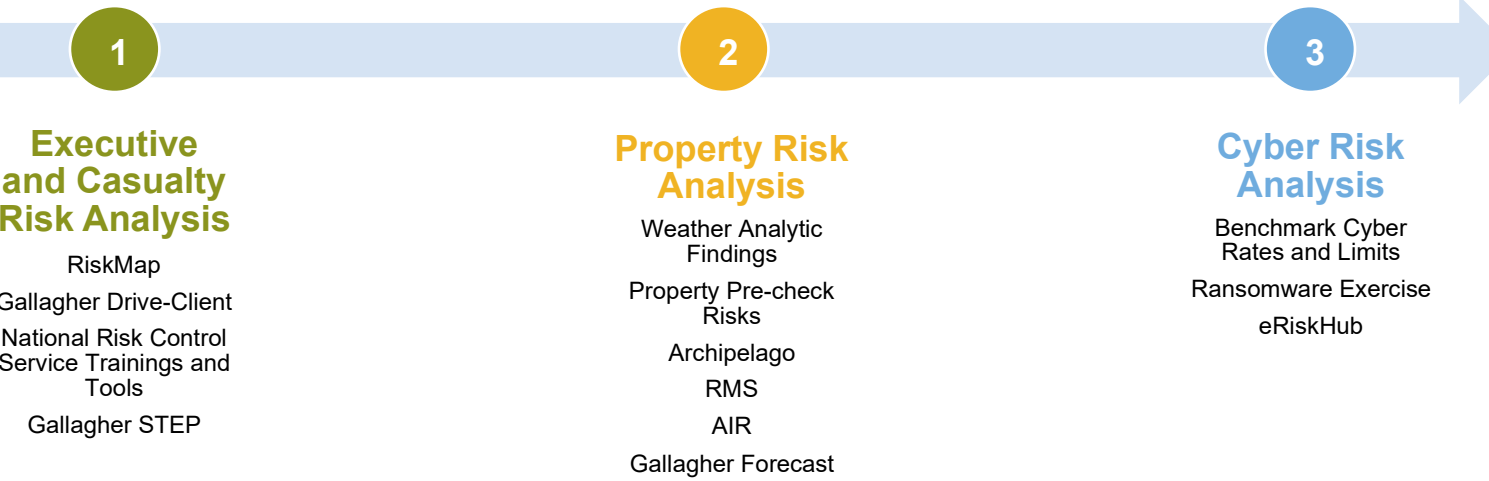
DELIVER EFFICIENCY AS IT RELATES TO TOTAL COSTS

Through the execution of Gallagher's professional standards and use of technology such as Gallagher Insight, Gallagher Drive and Gallagher Forecast, we are able to benchmark, collect, analyze, predict, manage, and report on data and information relative to the critical risk management and insurance programs we will work on with Jefferson Parish Government.

d. How will this technology help reduce the Parish’s expenses related to its insurance program?

UTILIZING TECHNOLOGY TO REDUCE YOUR TOTAL COST OF RISK

Gallagher has several proprietary tools mentioned previously that will help reduce the Parish’s total cost of risk related to your insurance program. Below we outline a few of these categories and the tools associated that could potentially impact your program.



Uncertainty is expensive. If underwriters do not trust the data, there is an additional price for that. The intent of each of these is to improve data quality and provide data consistently and clearly.

To highlight a few of the above tools:

National Risk Control has Gallagher Step – an online loss control training program with multiple modules. You will be allowed to choose 10 modules at no cost – with topics across the board - auto, lifting, employment practices, incident investigations, fork lift safety, on and on. The training is on-line, can be assigned to specific individuals and test results communicated back to the Parish.

Gallagher Forecast and Archipelago were discussed previously. In terms of saving dollars, Forecast is designed to show you prior to a weather event which specific properties (and their TIV) are at risk. The thought is by having advance warning, you can mitigate damages proactively.

Archipelago makes property underwriters’ jobs a bit easier. It is a tremendous SOV tool. At this point anyway, no other brokers offer this.

RMS and AIR are property modeling tools. Carriers model your risk as required by A.M. Best and Standard and Poors. We model as well to show you a baseline of where carriers are starting in their rating process. The difference between their rating results with RMS and AIR is they overlay their existing geographic footprint over your specific modeling. Their reinsurers often limit the size of a footprint in a specific region and carriers track their aggregate exposure. For Jefferson, the model provides you with what carriers believe your Problem Maximum Loss and Average Annual Loss dollar amount is. Some clients use it to decide what limits make sense. Keep in mind – the models have NEVER been correct, but it is the only tool available. On another note - we LOVE and use the PML and AAL numbers. With improved data – the MATH results for PML and AAL will improve – which means the PML and AAL will decrease. It is the test that shows impact of your data on the actual math.

Cyber Defence Center will be presented to Jefferson for consideration. The cost is \$3500 annually. We cannot waive it and it is not contemplated in our fee. Basically Jefferson would receive cyber services – from cyber experts (NOT BROKERS) who had major positions in large governments and organizations. Services include:

- 1) Running a scan on your system every 14 days to see if anything new is lurking. Success story: Two weeks ago- one of our major clients – nameless – involved with homeland security – received an email from this team. Their two week scan found a problem, identified it, reached out immediately to the client and gave them a heads up. Crisis averted.
- 2) Monthly group calls with clients’ IT leaders and the cyber team occurs where updates are given on emerging threats, what seems to be coming down the pipe, regions impacted, etc.
- 3) Every quarter cyber risk management training is available for YOUR employees covering basic topics such as phishing, working from home, protecting laptop info, etc.

Does the \$3500 with Cyber Defence center pay for itself? It does. Your cyber underwriter alone will react positively to this. Prevention of incidents saves Jefferson deductible dollars as well as positive premium impact.

B. Please provide the names and positions of each professional to be assigned to the Parish’s account, including their knowledge and experience with other public entities. Describe the professional qualifications and education of each team member. Provide two (2) references for each team member.

YOUR GALLAGHER TEAM



Nancy Sylvester, ARM-P, CPCU

Area Executive Vice President

Baton Rouge, LA

Joined Gallagher in 2000

Started in Risk Management in 1986

Nancy joined Gallagher in 2000. She has devoted her career to public risk management; first as a practitioner, then a director of risk management for a national public entity insurance carrier, and then as a leader in Gallagher’s support for its public housing, education and public sector clients. Nancy received a bachelor’s degree from McNeese State University. She has earned an Associate in Risk Management for Public Entities and a Chartered Property Casualty Underwriter designation. Nancy speaks regularly at national and state conferences on the topics of risk management, FEMA, insurance and leadership.

Nancy is the recipient of multiple awards for her work in the public sector. She received the Power Broker Award presented by *Risk & Insurance* magazine in 2012, 2013 and 2019 in the education category and in 2014 and 2016 in the public sector category. Nancy has received a Leadership Award from Liberty Mutual and *Risk & Insurance* magazine. She was named Women to Watch by *Business Insurance* magazine. Additionally in 2016, Nancy was the recipient of the Top Producer Award presented by *Insurance Business America*.



Sophie Capella

Producer Associate

Metairie, LA

Joined Gallagher in 2022

Started in Insurance in 2021

Sophie joined Gallagher as a full-time producer in August 2022 after completing the summer internship program the summer prior. Sophie’s responsibilities include creating new business opportunities, assisting senior producers in their prospecting and business retention efforts, and maintaining her own book of business. Sophie received her Commercial Lines Coverage Specialist certification from The Hartford School of Insurance in 2023. Sophie earned her Bachelors of Business Administration from the University of San Diego.



Noah-Jason Lewis, MBA, CPCU, ARM-E, CSRM

President | Noah W. Lewis & Associates | Gallagher Connect Partner

New Orleans, LA

Noah-Jason F. Lewis (“Jason”) is President of NWLA and charged with managing the commercial book of accounts for the agency. His office is located at 10001 Lake Forest Blvd., STE 512, New Orleans, LA 70127. The three largest clients for which NWLA servers in a minority partner capacity are: New Orleans East Hospital, New Orleans Public Belt Railroad (with Gallagher), and the Port of New Orleans (with Gallagher). Jason’s responsibilities are to manage relationships with mid to large commercial clients, develop products and programs to address specific customer needs, perform market analysis and segmentation to identify areas of opportunity, craft and implement strategic growth initiatives, and participate in business development and the evaluation of insurance carriers, products and services entering the market. Jason will be instrumental in working to achieve loss control and risk management objectives set forth by the team leader.



William J. Jackson, CLCS

Area President

Metairie, LA

Joined Gallagher in 2013

Started in Insurance in 2008

William Jackson manages the New Orleans office with a focus on client satisfaction and client growth. He ensures excellent client service delivery, and manages relationships with insurance company and vendor partners. William develops internal resources to broaden and enhance the ability to serve clients, recruits and mentors new producers, expands the expertise of the existing team, and handles mergers and acquisitions. He has expertise in international manufacturing risks, self-insurance pooling, agribusiness, and complex CAT-exposed property placements.

William began his career in 2008 and joined Gallagher in 2013. Prior to joining Gallagher, he served as a commercial agent for Shelter Mutual Insurance Company. William has performed a variety of roles while at Gallagher. Most notably, his past roles include serving as the Area President for North Louisiana from 2019-2021 and as a P&C broker for Gallagher's Jackson, MS operation from 2013-2019. Additionally, William helped spearhead the acquisition and subsequent development of Gallagher's Crop Insurance & Agribusiness Practice for the Mid-South Region.

William received a bachelor's degree from Mississippi State University. He has earned a Commercial Lines Coverage Specialist designation. William is the recipient of the Power Broker Award presented by *Risk & Insurance* magazine in 2020 for the at-large sector. He is a member of the University of Louisiana Business College advisory board and a volunteer for the United Way of Northeast Louisiana.



Joey Sylvester

Managing Director | Cyber Risk Management US

Metairie, LA

Joined Gallagher in 2013

Started in Insurance in 2013

Joey Sylvester is responsible for driving strategy for the Specialty Programs Practice, including technical expertise, best practices, and growth for the region. He provides advice and support for coverage, program design and market negotiations to production and service teams with a focus on compliance. He assists in the development of new business, designing and implementing insurance programs and providing country-specific insurance regulations. Joey began his insurance career when he joined Gallagher in 2013. He served as program manager for exclusive insurance products related to disaster management, violent acts, and terrorism. Additionally, Joey was a member of Gallagher's Enterprise Risk Management Practice Group and an assisting consultant. He brings a deep understanding of organizational culture and psychology to ERM projects and assists with risk assessments, evaluations, data management and plan development. Joey received a bachelor's degree from Louisiana State University and a master's degree from New York University. He is the recipient of the Power Broker Award presented by *Risk & Insurance* magazine in 2020 for the cyber sector. In 2015, Joey joined the U.S. Technical Advisory Group to ISO 31000. He has represented the U.S. at an international work group meeting and is currently a member of the Human and Cultural Factors Work Group. Joey is one of a handful of people certified as NIST CSF 2.0 LEAD IMPLEMENTER.



Ashley Broussard

Client Service Manager | Property Practice

Baton Rouge, LA

Joined Gallagher in 2019

Started in Insurance in 2014

Ashley is a Client Service Manager specializing in large accounts with complex servicing needs and schedules. Ashley services accounts with over \$1 billion in TIV. She works closely with producers and clients to ensure highest level of service. Ashley has over 9 years of experience in the insurance industry.

Ashley is a recipient of the 2020 Outstanding Client Service Award and a nominee for 2021 Wachs Award – an award given to an individual or team for outstanding service and superior contribution to Gallagher. Ashley received her bachelor's degree from Louisiana State University.



Julie McFadden

Client Service Manager

Baton Rouge, LA

Joined Gallagher in 2023

Started in Insurance in 1994

Julie McFadden is a full time licensed professional property and casualty insurance agent. She has been with Gallagher October, 2023. Julie has worked in the insurance industry for over 30 years with experience in both personal lines and commercial lines. Her experience has been focused on construction accounts, habitational and public sector.



Charlie Dirks, JD

Regional Claims Advocacy Leader | National Risk Control

Metairie, LA

Joined Gallagher in 2017

Started in Insurance in 2017

Charlie uses his education and experience to aid in the resolution of complex insurance issues for clients. He assists clients with recovering seven figure property losses, finding coverage after initial denial for multimillion dollar liability claims, reviewing countless contracts for indemnification and insurance provisions, as well as developing strategies with clients in order to assist them with preventing losses and how to handle them once they occur. Charlie specializes in assisting clients with complex litigation claims. He works in a variety of areas including marine, directors & officers liability, professional liability, healthcare and public sector.

Charlie started his insurance career when he joined Gallagher in 2017. Before he joined Gallagher, he practiced law for 19 years, working the entire time in both the public and private sectors. Gallagher recruited Charlie to join its risk management team after he served as the executive counsel for the Louisiana Department of Veterans Affairs under Governor John Bel Edwards. Charlie also served as executive counsel under Governor Bobby Jindal at the Louisiana Department of Children and Family Services. At both agencies, Charlie performed risk management duties, including establishing an enterprise risk management structure to address all forms of risk within the departments. During his tenure with both agencies, Charlie also contributed to the implementation and use of data analytics and metrics to evaluate the effectiveness in which they delivered services and analyze risk across their respective operations. Before he worked for the State of Louisiana, Charlie practiced law in Baton Rouge for 14 years, with a concentration on representing clients who experienced legal issues relating to the public sector and public administration.

Charlie received his bachelor's degree and his juris doctor from Louisiana State University. He is a member of the Louisiana State Bar Association and the New Orleans Mariners Club.



Debbie Crosby

Senior Claims Advocate | Public Sector Practice

Shreveport, LA

25+ years of insurance experience

Debbie is a designated Claims Advocate for the Gallagher Public Sector Practice. She is a former K-12 risk manager and is knowledgeable of the issues facing our school districts, including assault and physical contact claims. Due to her diverse background in claim and risk management, she has the ability to provide custom tailored strategies to clients for a variety of issues.

Debbie Crosby has over 25 years' experience in claims management from a carrier, third party claims administration, and insured prospective. She is experienced in multi-line claims with high exposure and complex litigation for public sectors, K-12, and secondary education. Her fields of expertise include Workers' Compensation, Commercial Property, General Liability, Automobile, and Professional Liability claims. She is experienced in risk management, claim consulting, claim reviews, audits, and third party claim administrator evaluations.



Jim Smith, M.S., CSP

Regional Risk Control Leader | National Risk Control

Boca Raton, FL

Joined Gallagher in 2000

Started in Insurance in 1982

Jim Smith coordinates and manages loss control services by working with client management teams in creating safety management processes to reduce claim costs and manage risk. He conducts comprehensive gap analyses for baseline assessments of his clients' safety management systems; develops corporate strategic plans to improve pre-loss performance to reduce claims; and collaborates with the respective management teams to implement and improve safety management systems to better manage risk and reduce the total cost of risk.

Jim began his career in risk management, safety and claims in 1982 and joined Gallagher in 2000. He is a frequent speaker for national and regional safety insurance associations on topics including managing safety, risk, creating effective safety climate, workers' compensation cost reduction, claims loss trends, safety management systems, gap analysis, fleet safety operations, risk control, risk management, and workplace safety. Jim was recently appointed to The Workers' Compensation Institute's first board of advisors.

Jim received a bachelor's and master's degree from the University of Central Missouri. He has earned a Certified Safety Professional designation. Jim is a member of the American National Standards, ANSI/ISO Risk Management Standard, ANSI Standard Safety Code for Walking/Working Surfaces, ANSI Standard Construction Multi-Employer Work Projects, and ANSI Z10 Standard Occupational Health and Safety Management System. Jim is the original executive member that created the standard.

C. Provide an explanation of what distinguishes the services the Firm can provide from other Person or Firms, and any additional or unique services your Firm would provide to the Parish.

Gallagher's Public Sector & K-12 Education Practice

Gallagher established our commitment to the K-12 Education Sector 40 years ago, when we formed our dedicated practice group, which now has more than 180 risk management professionals from 43 branches. We're invested in the public sector and associations. We have access to all insurance markets that specialize in the public sector and maintain an excellent reputation in the industry. We are dedicated to providing excellent service in a highly ethical manner.

This division has grown to become the largest Public Entity broker in the U.S., placing over \$1.5B of Public Sector insurance premiums each year with the key Public Sector insurance companies and underwriters. Gallagher associates remain on the forefront of Public Sector risk management – from ERM and ISO 31000 engagements to tailored risk financing structures in order to address impacts of climate change and other emerging risks.

Much of our company's growth and success can be attributed to our innovation of new risk financing strategies and alternatives for our Public Entity clients. In the early 1970s, Gallagher designed the first integrated, multi-line "protected self-insurance" program (a single policy providing both specific and aggregate protection). This growth gives us a broad perspective when we focus on risks. We help our clients consider risks across their entire enterprise as we advise them on insurance placements, risk management services, healthcare and pharmacy benefits, and human resources consulting.

Gallagher is the preeminent provider of brokerage and risk management services in the public sector. Our expertise and knowledge is unparalleled in the industry. Gallagher is consistently recognized by key professional associations (such as NBOA) for our commitment to public sector and K-12 schools and expertise in risk management.

Gallagher's Public Entities can be summarized in a few quick numbers:

- 2,660 stand-alone public, private, independent and charter schools
- 120 Public Sector and K-12 Education pools (covering 5,000+ pool members)
- 3,200 Public Entities; including: cities, counties, towns, housing authorities, special districts, and state and tribal governments

SUBSCRIPTION CENTER

Jefferson Parish will have access to Gallagher's subscription center and web-based training platform that provides the tools needed to effectively manage and train your staff, communicate important information related to safety and health, and enhance your overall risk management program.

Subscription Center: Gain access to Gallagher's industry newsletters today and get fresh insights and expertise from our global risk management experts including industry alerts, safety tips, webinar invites and much more.

General risk management and safety subscriptions are also available. In addition to our industry-specific newsletters, Gallagher offers newsletters that are relevant across all industries.

- Cyber Liability
- Executive and Financial Risk Liability
- Risk Control Safety Topics
- Risk Management Strategies & Resources

WEBINARS AND SEMINARS


Executives and risk managers in today's quickly changing environment need valuable and credible insight, but most likely do not have unlimited time to find and view it. We have collected this series of brief webinars focused on the content we know is most important to you, available to view at your convenience. Each episode is less than 10 minutes, and we will post new episodes weekly, keeping Jefferson Parish at the forefront of upcoming risks.

Public Sector & K-12

10,900+
Global clients


500+
Global professional experts

\$2.7B+
In annual premium




PUBLIC SECTOR | WEBINARS

State of the Insurance Market for Public Entities and K-12 Education Summer 2023




PUBLIC SECTOR | ARTICLES

Top Public Entity Insights: Results from the 2023 Benefits Strategy & Benchmarking Survey




PUBLIC SECTOR | ARTICLES

Public Entity Addendum: Results from the 2022 Benefits Strategy & Benchmarking Survey




PUBLIC SECTOR | ARTICLES

K-12 Education Addendum: Results from the 2022 Benefits Strategy & Benchmarking Survey



PUBLIC SECTOR | ARTICLES

Trusting Consulting Relationship Enables Holistic Approach and Mitigates Compliance Risk



PUBLIC SECTOR | ARTICLES

Prepare Now for FLSA Rule Changes Coming Soon

STRATEGIC WHITE PAPERS

Thought leadership developed by our team of specialist risk managers and specialized claim advocates/attorneys focused on sharing expertise and insights across key topics.

WEBSITE

Our website contains a “Knowledge Center,” which serves as a resource of white papers, articles, and research for our clients covering a wide range of topics, from property & casualty risk to benefits and HR resources. It also includes state-specific information and alerts on regulations and trends.

Additional Relevant Practice Group Expertise



OUR SERVICE PHILOSOPHY

We are dedicated to providing industry-leading customer service, with your satisfaction as our top priority; this is fundamental in how we do business. We deliver exceptional value to our clients by:

- Investing in the knowledge of our client's businesses and industries
- Listening closely to our clients about their expressed and unexpressed needs
- Providing a dedicated client service team
- Offering proactive ideas that advance and protect our clients' businesses
- Being flexible to respond to changes in our client's business needs
- Communicating candidly, directly, and often with our clients
- Leveraging the best tools to realize efficiency and cost savings for our clients
- Paying attention to logistics: when we deliver is as important as what we deliver
- Doing what we promise
- Being accountable for our performance

We require these commitments for ourselves. You get intelligent, aggressive, cost-effective consulting when you need it, as you need it, and consistent with our client's commitment to high quality. We use in-house training, outside continuing education training, and in-house specialists to educate us and keep our consultants' knowledge "state of the art." We innovate on behalf of our clients, making our consulting services the most creative and effective as possible and finding new ways to communicate with our clients cost-effectively and timely. Early analysis and definition of the issues – with a pragmatic determination of the right strategy to meet your goals – allow us to help you avoid the more significant expense, lost time, and spent resources that a less disciplined approach would incur. Our philosophy is to bring you superior consulting services at exceptional value.

ONGOING SERVICE

Gallagher's ongoing support throughout the year will start by developing an annual service plan, primarily composed of day-to-day program administration, renewal preparations, and marketing. The pandemic crisis presented the need to move quickly to a fully remote workforce, requiring work-at-home protocols and system capabilities that had been in place for several years before this event. The timing of the check-in calls varies depending on the time of year (e.g. weekly to bi-weekly calls during renewals or monthly calls during non-renewal times). As a true extension of Jefferson Parish's risk management resources, we believe the regular check-in calls are critical to our relationship building and success in communicating the Jefferson Parish message into the marketplace.

We understand the importance of following through and delivering on our promises. We commit ourselves to high professional standards from pre-renewal strategy meetings to mid-year stewardship meetings. Gallagher has a comprehensive Professional Standards Manual that outlines policies and procedures to facilitate client service excellence in all our risk management consultations and ensure we deliver consistent, high-quality service. Although we have specific standards, we realize Jefferson Parish may have particular needs, and our team is prepared to meet any rush timelines you throw its way.

D. Describe the method you will use to secure competitive quotes for the Parish’s insurance program, including surplus lines relationships and intended usage.

Through our work with local governments in Louisiana, we have developed a strategic approach to providing risk management services in a specific and targeted manner. Having the greatest understanding of governmental risks of any retail broker in the State, we have identified areas of greatest impact to managing your risk. At the onset of our engagement, we develop a plan to provide these services throughout the years. Our team does not limit ourselves to simple insurance placement and administration. We will work with you to continuously improve your risk management program to protect your assets, budget and people.

Sample Risk Management Project Plan

1. Develop Total Cost of Risk to Set Baseline and Measurable KPIs

- We will develop TCOR baseline and key KPIs
- Benchmark program against peer municipalities and leverage market position
- Implement or enhance Safety Committee meetings to manage and measure
- Institute Executive Risk Committee to provide oversight and direction

2. Identify Hazards, Uninsured Loss Exposures, and any Coverage Gaps

- Analyze Climate Change Factors & Property Sub-Limits
- Analyze and discuss the erosion of Sovereign (Qualified) Immunity
- Conduct Gap Analysis of insurance program for vulnerabilities
- Discuss *Emerging Topics* to be proactive

3. Immunity Preservation: Review Immunity Whitepaper and Emerging Trends

- Leverage Immunity for state-torts – but consider federal tort trends and loss scenarios
- Compare benchmarked limits and coverages with peers

4. Leverage Gallagher Resources to Modernize Risk Management:

- Modernized Safety Manual for Cities & Counties – issued in 2020
- Perspectives of Sovereign Immunity – whitepaper completed in 2021
- Modern Contractual Insurance Requirements guidelines – issued in 2022

5. Conduct Risk Assessment and Gap Analysis

- Meet with individual departments to review policies and procedures to implement or enhance
- Implement Gallagher Risk Map™ to provide Parish leadership with an enterprise wide risk assessment to inform/develop strategic initiatives

6. Risk Profile Improvement

- Conduct historical analysis to identify factors having greatest impact on your risk profile
- Conduct discovery meetings with senior management to discuss known/unknown risks
- Conduct strategy sessions with risk and claims consultants to identify analytical tools to improve profile
- Develop action plan for Parish risk management and program marketing

7. Annually analyze TCOR and risk financing methods







- Discuss *Emerging Topics* to be proactive
- Quantify and budget for deductibles; optimize risk retention levels



CORE360® Approach to Risk Management

CORE360® is our unique comprehensive approach of evaluating our client's risk management program that leverages our analytical tools and diverse resources for customized, maximum impact on six cost drivers of their total cost of risk.



 <p>INSURANCE PREMIUMS Cost for all your existing insurance policies. It also includes our compensation as your broker.</p>	 <p>UNINSURED & UNINSURABLE LOSSES Potential or actual costs of any risks you knowingly or unknowingly leave uninsured or uninsurable.</p>
 <p>PROGRAM STRUCTURE How the individual pieces of your program work together, as well as how you balance your risk appetite against your loss experience.</p>	 <p>LOSS PREVENTION & CLAIMS Your participation in a loss and how you minimize costs through appropriate loss prevention programs and claims management.</p>
 <p>COVERAGE GAPS Potential costs from any gaps in existing policies, such as sublimits, removable exclusions and extensions of coverage.</p>	 <p>CONTRACTUAL LIABILITY Costs resulting from the unsuccessful transfer of risk to, or assumption of uninsured liability from, a third party.</p>

The term Total Cost of Risk (TCOR) is not new and is widely used throughout the insurance industry. Many brokers frame their strategies around TCOR, however many fail to quantify the risks and even more fail to help clients minimize those costs. Rather than focus solely on *costs* and *premium*, Gallagher's approach takes into account six total drivers in order to get a complete picture of risk and the costs to your organization. It's not enough to simply identify loss trends, and offer varying renewal solutions. Through our efforts, we continuously challenge your existing program and look for opportunities for future improvements and TCOR reductions. Partnering **CORE360®** with our Public Entity Strategic Risk Management Services and Risk Profile Improvement, Gallagher's broad team and various areas of expertise are designed to help our clients take a proactive approach to both insurance placement, and risk and safety activities.

- 1. **CORE360®** is our comprehensive approach to evaluating your risk management program.
- 2. Gallagher leverages customized tools and resources for maximum impact on six cost drivers of your total cost of risk.
- 3. We continuously challenge your existing program and look for opportunities for future improvements and cost reductions.
- 4. We mutually agree on a renewal strategy to build the most optimal risk management program for you.

Risk Profile Improvement

- 1. **Historical Analysis** – Identify the factors that have the greatest impact on your risk profile
- 2. **Discovery** – Conduct discovery meetings with senior management and identify areas of greatest need
- 3. **Assessment & Prioritization** – Internal strategy sessions with Gallagher Risk & Claims Consultants and practice group leadership | Identify analytical tools to improve risk profile
- 4. **Develop an Action Plan** – Action plan Active Claims Analytics and Claims Advocacy
- 5. **Develop a Winning Market Submission** – Provide a narrative and submission that will be a top priority for underwriters by minimizing their risk through an improved profile for Jefferson Parish.

Public Entity Strategic Risk Management Services

- 1. We apply advanced risk management techniques to you, your team, and your entity on an ongoing basis
- 2. We provide quantitative data like Benchmarks, Metrics, and other KPIs
- 3. Active Claims Analytics and Claims Advocacy
- 4. Enterprise Risk Management and Industry Insights

Once we design a framework for managing your program we identify dominant priorities and triage the approach. Focusing on immediate and long term goal allows us to work efficiently towards reducing your Total Cost of Risk. We deploy resources ranging from loss control to claims advocacy and benchmarking services to provide impact.

CUSTOMIZED RISK IMPROVEMENT STRATEGY TO INCLUDE	
Claims Analysis and Review of Injury/Illness Logs	Onsite Safety Audits – Workers’ Compensation, General Liability, Property, Auto
Onsight Safety & Health Training (over 50 Topics)	NSC Defensive Driver Training (4hr.)
SAFETY PROGRAM AND SAFETY MANAGEMENT SYSTEM REVIEW	
Gap Analysis	Elements of an Effective Safety & Health Program
Risk Management Procedures and Rules	Industry Best Practices

In addition to our National Risk Control group’s library of training and seminars, Gallagher’s Public Sector Practice has developed targeted training opportunities for risk management and additional Parish departments:

TARGET AUDIENCE	TRAINING TOPICS
Risk Management Staff	<ul style="list-style-type: none">• Risk Management Perspectives on Sovereign Immunity• Modern Contractual Guidelines• Insurance Program Overview
Procurement Staff	<ul style="list-style-type: none">• Modern Contractual Guidelines
Department Heads	<ul style="list-style-type: none">• Insurance Program Overview
Parish Leadership	<ul style="list-style-type: none">• Risk Management Perspectives on Sovereign Immunity

Onboarding and Discovery

As we onboard new clients, we start with a kickoff meeting to learn about you and your risk management program. Understanding your entity, your changes, and your exposures is important so that we can professionally advise you about how to modify and update your insurance program. No matter how small the update or change is, it is important that you engage in conversation with updates.

Sample Discovery Questions

OPERATIONAL RISKS

1. Growth strategy and other strategic initiatives
2. Changes in leadership
3. Changes in elected officials
4. Additional tax revenue sources (SPLOST, Grants, etc.)
5. Do you have employees residing in other states?

CONTRACTUAL – THIRD PARTY

1. Newly assumed contractual liability, granting of indemnities, or hold harmless agreements
2. If the Insured leases workers or uses temporary staffing, can we review the contract?
3. Please describe any changes to outsourced services

Risk Profile

Understanding your current Risk Profile allows us to set a baseline and starting point for the needs of Jefferson Parish.

CLIMATE CHANGE RESILIENCY

1. What are your Capital Expenditure plans?
2. What buildings are being renovated or updated?
3. What building roofs are being replaced?
4. What is your preventive maintenance program?
5. Do you have a disaster recovery plan? When was the last time it was updated?

FLEET SAFETY

1. Do you have a fleet safety policy?
2. How often do you run MVRs?
3. What is your MVR review criteria?
4. Do you have a safety committee and/or accident review committee?
5. What is your take home vehicle policy?

LIABILITY RISK MITIGATION

1. EPLI: When was your last time your employee handbook was updated?
2. GL: Do you perform background checks AND abuse registry checks for ALL applicants?
3. LAW: What is your high-speed pursuit policy?
4. E&O: What kind of EPLI/Discrimination training do you require of elected officials?
5. ERM: How are senior administrators/management updated on risk management topics?



4/30/2024

Signature

Date

Area President


Title

PLEASE NOTE: Jefferson Parish reserves the right to verify any information provided herein.

ATTACHMENT E
LIST OF PRIOR OR CURRENT
PUBLIC ENTITY ACCOUNTS

Name of Firm: Arthur J. Gallagher Risk Management Services, LLC

PUBLIC ENTITY Address	PERIOD HANDLED	CONTACT PERSON Phone Number
1) <u>State of Louisiana</u> <u>1201 N. 3rd St., Baton Rouge, LA 70802</u>	<u>Client since 2015</u> <u>Confidential</u>	<u>Melissa Harris</u> <u>225-342-6331</u>
2) <u>Louisiana State University</u> <u>253 LSU Alumni Ctr., Baton Rouge, LA 70803</u>	<u>Client since 2018</u> <u>Confidential</u>	<u>Brandi Roberts</u> <u>225-931-2769</u>
3) <u>Louisiana Housing Council</u> <u>119 Boyce Gardens, Boyce, LA 71409</u>	<u>Client since 1980</u> <u>Confidential</u>	<u>Pat Boss Jackson</u> <u>318-481-9729</u>
4) <u>Calcasieu Parish Sheriff's Office</u> <u>5400 E. Broad St. Lake Charles, LA 70615</u>	<u>Client since 2004</u> <u>Confidential</u>	<u>Jeff Cole</u> <u>337-377-1924</u>
5) <u>Cameron Parish School Board</u> <u>510 Marshall St. Cameron, LA 70631</u>	<u>Client since 2009</u> <u>Confidential</u>	<u>James Hoffpauir</u> <u>337-794-3591</u>
6) <u>Port of New Orleans</u> <u>16201 E. Main St., Cut Off, LA 70345</u>	<u>Client since 2014</u> <u>\$7M</u>	<u>Ronald Wendel</u> <u>985-601-4444</u>



4/30/2024

Signature

Date

Area President

Title

To provide additional Accounts, make copies of this page.

PLEASE NOTE: Jefferson Parish reserves the right to verify any information provided herein.

² Within the last 10 years.

ATTACHMENT F

ATTACHMENT F
LIST OF ACCOUNTS WITH TOTAL COST OF RISK IN EXCESS OF
\$5,000,000

Name of Firm: Arthur J. Gallagher Risk Management Services, LLC

ACCOUNT NAME	PERIOD HANDLED	CONTACT PERSON
Address	Cost of Risk	Phone Number
1) State of Louisiana	Client since 2015	Melissa Harris
1201 N. 3 rd St., Baton Rouge, LA 70802	\$40M	225-342-6331
2) Louisiana State University	Client since 2018	Brandi Roberts
253 LSU Alumni Ctr., Baton Rouge, LA 70803	\$10M	225-931-2769
3) Louisiana Housing Council	Client since 1980s	Pat Boss Jackson
119 Boyce Gardens, Boyce, LA 71409	\$15M	318-481-9729
4) Port of New Orleans	Client since 2014	Ronald Wendel
16201 E. Main St., Cut Off, LA 70345	\$7M	985-601-4444
5) New Orleans Convention Center	Client since 2011	Alita Caparotta
900 Convention Center Blvd, New Orleans, LA	\$6M	504-582-3022
6) Archdiocese New Orleans	Client since 2021	Lee Eagan
7887 Wamsley Ave., New Orleans, LA	\$5M+	504-810-5838

W. J. J. J.

4/30/2024

Signature

Date

Area President

Title

It is not necessary to list six (6) accounts with total cost of risk in excess of \$5,000,000 to meet the minimum requirements.

PLEASE NOTE: Jefferson Parish reserves the right to verify any information provided herein.

³ Within the last 10 years.

D. FEE SUBMISSION:

Person or Firm's fees and other costs, if any, shall be submitted (see Attachment G). This Fee Submission shall include any and all costs the Person or Firm wishes to have considered in the contractual arrangement with the Parish of Jefferson. The Person or Firm should propose fees for servicing the insurance program as outlined in Attachment B and the SOQ's Scope of Services.

Fees should be presented on an annual basis. These fees should be net of commissions, including any placement service agreements (PSA), or marketing service agreements (MSA) from any insurance policies secured on behalf of the Parish of Jefferson. The Parish of Jefferson will only consider proposals from Proposers willing to place coverage on a flat fee basis, net of commissions, for all lines of coverage other than NFIP as indicated in Attachment B. All NFIP policy coverage will be serviced and placed on a commission basis by the Producer but shall be excluded from the flat fee proposal amount offered by the Producer.

With the exception of NFIP policy coverage, the following shall apply:

The Producer agrees that no commissions shall be retained; the Producer agrees that no fees from a third party (MGA) shall be retained. Any and all services provided have been pre-agreed to and a fee has been negotiated to fully compensate the Producer for services provided. All commissions, if any, including policies issued by State or Federal Agencies paid to Producer, shall be remitted to the Parish unless prohibited by law. The Producer attests that all commissions remitted to the Parish are not by any means or definition a rebate and are in compliance with applicable Louisiana Law. Terms and conditions of this contract are based purely on a fee for service basis and any deviation from said agreement shall be cause for termination of agreement by the Parish. Any commissions received by the Producer on policies that the carrier cannot or will not remove from the premium will be credited to the annual flat fee paid by the Parish to the Producer.

Please note that the Parish reserves the right to negotiate further terms and conditions, including price, with any of the Person or Firms that submits a response to this SOQ.

ATTACHMENT G
FEE SCHEDULE

Name of Firm: Arthur J. Gallagher Risk Management Services, LLC

JP Property, Casualty, and Liability Insurance including NFIP coverages:
Please provide a compensation flat fee schedule for the periods indicated below using data outlined in Part 2 Scope of Services, Part 1.4.D, and Attachment B of the SOQ.
Please note: flat fee will exclude NFIP commissions; commissions for NFIP will be paid in addition to and separately from the agreed upon flat fee.

TERM	FEE
09/01/2024-25	Annual fee is \$0. Gallagher will collect commissions only on the NFIP, assuming commissions meet or exceed \$100,000. If NFIP commissions do not reach \$100,000, a flat fee will be added to make up the difference. Example, if NFIP commissions total \$95K, Gallagher will request a fee of \$5,000.
09/01/2025-26	Annual fee is \$0. Gallagher will collect commissions only on the NFIP, assuming commissions meet or exceed \$100,000. If NFIP commissions do not reach \$100,000, a flat fee will be added to make up the difference. Example, if NFIP commissions total \$95K, Gallagher will request a fee of \$5,000.
09/01/2026-27	Annual fee is \$0. Gallagher will collect commissions only on the NFIP, assuming commissions meet or exceed \$100,000. If NFIP commissions do not reach \$100,000, a flat fee will be added to make up the difference. Example, if NFIP commissions total \$95K, Gallagher will request a fee of \$5,000.
09/01/2027-28	Annual fee is \$0. Gallagher will collect commissions only on the NFIP, assuming commissions meet or exceed \$100,000. If NFIP commissions do not reach \$100,000, a flat fee will be added to make up the difference. Example, if NFIP commissions total \$95K, Gallagher will request a fee of \$5,000.

If applicable, please disclose any additional fees for technology or technology-related services.
The on-line technology included in this document is at no additional charge. However, Cyber Defence (spelled the British way!) and NIST compliance/audit work is additional and quoted separately.

If necessary, do you agree to accept any or all of the annual fees indicated above in monthly payments?
Gallagher agrees

If you do not agree, please indicate your proposed payment scheme: N/A.



4/30/2024

Signature

Date

Area President

Title

E. General Services Questionnaire



SOQ 24-010-Insurance Producer Of Record Services for Its Property & Casualty Insurance Program **Jefferson Parish Government**

Project documents obtained from www.CentralBidding.com

01-May-2024 10:55:06 AM

General Professional Services Questionnaire Instructions

- The General Professional Services Questionnaire shall be used for all professional services except outside legal services and architecture, engineering, or survey projects.
- **The General Professional Services Questionnaire should be completely filled out. Complete and attach ALL sections. Insert “N/A” or “None” if a section does not apply or if there is no information to provide.**
- Questionnaire must be signed by an authorized representative of the Firm. Failure to sign the questionnaire shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- All subcontractors must be listed in the appropriate section of the Questionnaire. Each subcontractor must provide a complete copy of the General Professional Services Questionnaire, applicable licenses, and any other information required by the advertisement. Failure to provide the subcontractors' complete questionnaire(s), applicable licenses, and any other information required by the advertisement shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- If additional pages are needed, attach them to the questionnaire and include all applicable information that is required by the questionnaire.

General Professional Services Questionnaire

A. Project Name and Advertisement Resolution Number:

SOQ 24-010-Insurance Producer Of Record Services for Its Property & Casualty Insurance Program

B. Firm Name & Address:

Arthur J. Gallagher Risk Management Services, LLC
111 Veterans Memorial Blvd. Suite 1130
Metairie, LA 70005

C. Name, title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, with at least five (5) years of experience in the applicable field required for this Project:

William Jackson, Area President
Email: William_Jackson@ajg.com
Telephone: (504) 378.4604

D. Address of principal office where Project work will be performed:

111 Veterans Memorial Blvd. Suite 1130
Metairie, LA 70005

E. Is this submittal by a JOINT-VENTURE? Please check:

YES _____ NO X

If marked "No" skip to Section H. If marked "Yes" complete Sections F-G.

F. If submittal is by JOINT-VENTURE, list the firms participating and outline specific areas of responsibility (including administrative, technical, and financial) for each firm. Please attach additional pages if necessary.

1.

2.

General Professional Services Questionnaire

G. Has this JOINT-VENTURE previously worked together? Please check: YES _____ NO _____		
H. List all subcontractors anticipated for this Project. Please note that <u>all subcontractors must submit a fully completed copy of this questionnaire</u>, applicable licenses, and any other information required by the advertisement. See Jefferson Parish Code of Ordinances, Sec. 2-928(a)(3). Please attach additional pages if necessary.		
Name & Address:	Specialty:	Worked with Firm Before (Yes or No):
1. Gallagher is partnering with DBE Firm, Noah W. Lewis & Associates 10001 Lake Forest Blvd. Suite 512 New Orleans, LA 70127	Historical loss analysis, assistance with maintenance of the Statement of Values, the collection of information and completion of applications for coverage, overall risk management consultation, advising on current and emerging trends.	Yes, we work with Noah W. Lewis & Associates on several clients including the New Orleans Convention Center
2.		
3.		
4.		
5.		

General Professional Services Questionnaire

I. Please specify the total number of support personnel that may assist in the completion of this Project: 5+ _____
J. List any professionals that may assist in the completion of this Project. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's professionals that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.
PROFESSIONAL NO. 1
Name & Title: Nancy Sylvester, CPCU, ARM-P Area Executive Vice President / National Director Gallagher Public Sector Disaster Recovery
Name of Firm with which associated: Arthur J. Gallagher
Description of job responsibilities: Team lead for this project, leverages the marketplace to place property and liability insurance, maintains second largest property book within Gallagher US . Nancy will assist Jefferson with FEMA pre-procurement/ requirements, obtain and maintain issues and data needs.
Years' experience with this Firm: 20+
Education: Degree(s)/Year/Specialization: Bachelor's Degree- McNeese State University Associate in Risk Management for Public Entities (ARM) Chartered Property Casualty Underwriter designation (CPCU)
Other experience and qualifications relevant to the proposed Project: Power Broker Award from Risk & Insurance magazine in 2012, 2013, and 2019 in the education category and in 2014 and 2016 in the public sector category Women to Watch award - Business Insurance. Top Producer Award recipient by Insurance Business America magazine in 2016 Has property book valued at \$75 billion across the United States (18 years) Former managing director of Gallagher's public sector practice

General Professional Services Questionnaire

PROFESSIONAL NO. 2
Name & Title: Sophie Capella, CLCS Producer Associate
Name of Firm with which associated: Arthur J. Gallagher
Description of job responsibilities: Creating new business opportunities, placing property and liability insurance coverages, maintaining strong relationship with clients
Years' experience with this Firm: 2
Education: Degree(s)/Year/Specialization: Bachelor's of Business Administration- University of San Diego Commercial Lines Coverage Specialist- The Hartford School of Insurance
Other experience and qualifications relevant to the proposed Project: expertise in placing property coverage in coastal areas specifically (predominately SE Louisiana).

General Professional Services Questionnaire

PROFESSIONAL NO. 3
Name & Title:
Joey Sylvester Regional Director, Specialty Programs Managing Director- Cyber Risk Management
Name of Firm with which associated:
Arthur J. Gallagher
Description of job responsibilities:
Driving strategy for specialty programs, including technical expertise, best practices, and growth for the region; assists in the development of new business, designing, and implementing insurance programs, leads the Cyber Risk Management team for Gallagher US. Backup property broker, assisting Nancy and her book.
Years' experience with this Firm:
11
Education: Degree(s)/Year/Specialization:
Bachelor's Degree- Louisiana State University Two Masters' degrees, both from New York University 1) Industrial Organization Psychology. 2) Cyber Security. .
Other experience and qualifications relevant to the proposed Project:
Power Broker Award, Risk and Insurance in the cyber sector in 2020 and 2022. Business Insurance Breakout Award 2017 for creating new lines of coverage involving Crisis Response and Bespoke Terrorism coverage. Both lines underwritten by Lloyds of London and in use throughout the U.S. Member of the US Technical Advisory Group to ISO 31000 Has the NIST Cyber Security Framework 2.0 Lead Implementer Certification.

General Professional Services Questionnaire

PROFESSIONAL NO. 4
Name & Title: Charlie Dirks, JD Regional Claims Advocacy Leader, National Risk Control
Name of Firm with which associated: Arthur J. Gallagher
Description of job responsibilities: Assists clients with recovering seven figure property losses, finding coverage after initial denial for multi million dollar liability claims, reviewing contracts for indemnification and insurance provisions, developing strategies with clients to help them prevent losses
Years' experience with this Firm: 7
Education: Degree(s)/Year/Specialization: Bachelor's Degree and Juris Doctor- Louisiana State University Practiced law for 19 years before joining Gallagher
Other experience and qualifications relevant to the proposed Project: Served as executive counsel for the Louisiana Department of Veterans Affairs under Governor John Bel Edwards Served as executive counsel of Louisiana Department of Children and Family Services under Governor Bobby Jindal Under both agencies, Charlie performed risk management duties, including establishing risk enterprise management structure and implementing data analytics to help analyze risk Practiced law in Baton Rouge for 14 years, with a concentration in representing clients who experienced legal issues in the public sector and public administration realms

General Professional Services Questionnaire

PROFESSIONAL NO. 5
Name & Title: Jim Smith, M.S., CSP Regional Risk Control Leader, National Risk Control
Name of Firm with which associated: Arthur J. Gallagher
Description of job responsibilities: coordinates and manages loss control services by working with client management teams in creating safety management processes to reduce claim costs and manage risk, develops corporate strategic plans to improve pre-loss performance to reduce claims
Years' experience with this Firm: 20+
Education: Degree(s)/Year/Specialization: Bachelor's and Master's Degrees: University of Central Missouri Certified Safety Professional Designation
Other experience and qualifications relevant to the proposed Project: frequent speaker for national and regional safety insurance associations appointed to The Workers' Compensation Institute's first board of advisors member of the American National Standards, ANSI/ISO Risk Management Standard, ANSI Standard Safety Code for Walking/Working Surfaces, ANSI Standard Construction Multi-Employer Work Projects, and ANSI Z10 Standard Occupational Health and Safety Management System

General Professional Services Questionnaire

K. List all prior projects that best illustrate the Firm's qualifications relevant to this Project. Please include any and all work performed for Jefferson Parish. Please attach additional pages if necessary.

PROJECT NO. 1

Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>Property and Casualty Insurance Broker</p> <p>Client: State of Louisiana, including their public universities, superdome, etc.</p> <p>Location: 1201 N. 3rd St., Baton Rouge, LA 70802</p> <p>Length of Services Provided:</p> <p>Contact: Melissa Harris (225) 342-6331</p>	<p>Nancy leads this placement and includes handling and placing property and ancillary casualty insurance. Largest line of coverage placed for the state is property. Their TIV exceeds \$25 Billion. The placement is globally placed, including U.S., Lloyds of London, London markets (outside of Lloyds), Munich, Bermuda, Reinsurance, etc. First written in 2015, the State just renewed their brokerage contract for another three years minimum. Work began with improving underwriting data, bespoke modeling and development of relationships between the State and the underwriters.. Ancillary lines include internship casualty coverage for the State universities, terrorism, cyber, marine, aviation, etc.</p>
	Cost of Services Provided:
Client since 2015	\$1M+

PROJECT NO. 2

Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>Property and Casualty Insurance Broker</p> <p>Client: Louisiana State University</p> <p>Location: 253 LSU Alumni Ctr., Baton Rouge, LA 70803</p> <p>Contact: Brandi Roberts (225) 931-9729</p>	<p>Handling and placing property and casualty insurance. Work included data improvement to impact the modeling results. Lines of coverage include: property \$4B+ TIV, educators legal liability, employment practices, auto liability, cyber, marine, general liability, disaster response, Worker's Compensation, excess liability, athletic insurance, student internship coverage, foreign liability, pollution, terrorism, etc. Claims advocacy is provided on a daily basis. Developed direct relationships between LSU and the underwriters. Property modeling, benchmark reports (comparing against peers), risk management consulting and much more. Nancy leads. Savings this year? Yes..</p>
Length of Services Provided:	Cost of Services Provided:
Client since 2015	\$400K+

General Professional Services Questionnaire

PROJECT NO. 3	
Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>Property and Casualty Insurance Broker</p> <p>Client: Louisiana Housing Council</p> <p>Location: 119 Boyce Gardens, Boyce, LA 71409</p> <p>Contact: Pat Boss Jackson (318) 481-9729</p>	<p>Handling and placing property and casualty insurance since the 1980s. Led by Nancy since 2000. Place all lines of coverage on this pool. Approximately 110 members across the State of Louisiana, starting with Tier 1 properties along the Gulf Coast up to the border of Louisiana/ Arkansas. Lines include: property, auto, General Liability, public official liability, Board E&O/D&O, Worker's Compensation, terrorism, etc. Gallagher administers the pool, including risk management, claims advocacy, allocation determination, actuary work, etc. Savings this year? Yes.</p>
Length of Services Provided:	Cost of Services Provided:
Client since 1980	\$900K+

PROJECT NO. 4	
Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>Property and Casualty Insurance Broker</p> <p>Client: Port of New Orleans</p> <p>Contact: Ronald Wendel, CFO: 504-528-3599</p>	<p>Handling and placing property and casualty insurance, marine insurance. Work includes improving the data, assisting with carrier relationships, global property placement, claims advocacy, risk management assistance, third party risk transfer work (review contracts/COIs), FEMA procurement preparation, claims audits, etc. Nancy leads. Lines placed include worker's compensation, Jones Act, rail liability, law enforcement liability, MGL, excess, auto, pollution, marine, defense base act, cyber, property, inland marine, cyber, etc. Work includes third party risk transfer, claims advocacy, disaster preparation (pre-procured requirements), etc. .Property Savings this year? Yes.</p>
Length of Services Provided:	Cost of Services Provided:
Client since 2019	\$150K+

General Professional Services Questionnaire

PROJECT NO. 5	
Project Name, Location and Owner's contact information:	Description of Services Provided:
New Orleans Convention Center 900 Convention Center Blvd. New Orleans, LA Contact: Alita Caparotta, CFO 504-582-3022	Nancy leads. Places property and some casualty. Casualty consultant as well. Property program placed globally. Work includes claims advocacy, brokerage, third party risk transfer assistance, contract review, risk management consulting, casualty consulting and similar. Lines placed: property, bespoke disaster management, bespoke terrorism coverage, worker's compensation, OCIP, etc. Savings this year? Yes -double digit.
Length of Services Provided:	Cost of Services Provided:
Since 2012	\$100K+

PROJECT NO. 6	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Archdiocese New Orleans 7887 Wamsley Ave. New Orleans, LA 70125 Contact: Lee Eagan 504-810-5838	Property and casualty brokerage on a global basis, third party risk transfer, work with their captive, actuarial work, claims advocacy, risk management assistance, loss control, claims audits, etc. Nancy leads. Lines placed include: general liability, auto liability, property, cyber, student accident, educator legal liability, disaster management, terrorism, etc. A large amount of work is dedicated to improving the underwriting data and SOV management.
Length of Services Provided:	Cost of Services Provided:
3 years.	Approximately \$400K

General Professional Services Questionnaire

PROJECT NO. 7	
Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>Calcasieu Parish Sheriff's Office Lake Charles, LA Contact: Jeff Cole, Risk Mgr 337-377-1924</p>	<p>Property and casualty brokerage. Nancy leads. This year's renewal was a 20+ savings in price. Work includes assisting with data, placing: workers compensation, law enforcement liability, general liability, auto liability, disaster management, cyber, property, etc. Assisting with contract wording, risk transfer, training, risk management, etc is part of the work.</p>
Length of Services Provided:	Cost of Services Provided:
20 years	\$100K+

PROJECT NO. 8	
Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>Cameron Parish School Board 510 Marshall St. Cameron, LA Contact: James Hoffpauir 337-794-3591</p>	<p>Nancy leads. All property and casualty brokerage, including risk management assistance, data improvement, loss control, FEMA assistance, claims advocacy, loss control, underwriting relationship management, modeling, etc. Place auto, general liability, cyber, terrorism, disaster management, worker's compensation, equipment breakdown, etc. Provide annual loss control training to staff including drivers.</p>
Length of Services Provided:	Cost of Services Provided:
15+ years	\$75K+

General Professional Services Questionnaire

L. List all prior and/or on-going litigation between Firm and Jefferson Parish. Please attach additional pages if necessary. NONE TO REPORT.

Parties:		Status/Result of Case:
Plaintiff:	Defendant:	
1. N/A		
2.		
3.		
4.		

M. Use this space to provide any additional information or description of resources supporting Firm's qualifications for the proposed project.



N. To the best of my knowledge, the foregoing is an accurate statement of facts.

Signature:  Print Name: William Jackson

Title: Area President Date: 05/06/2024

APPENDIX



Gallagher

The Gallagher Way. Since 1927.

Gallagher Tenet #11

We all need one another. We are all cogs in a wheel.

The information contained herein is offered as insurance industry guidance and provided as an overview of current market risks and available coverages and is intended for discussion purposes only. This publication is not intended to offer legal advice or client-specific risk management advice. Any description of insurance coverages is not meant to interpret specific coverages that your company may already have in place or that may be generally available. General insurance descriptions contained herein do not include complete Insurance policy definitions, terms, and/or conditions, and should not be relied on for coverage interpretation. Actual insurance policies must always be consulted for full coverage details and analysis.

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