



**BIDS RECEIVED**

SECTION A  
COUNTY OF SAN DIEGO REQUEST FOR BID  
THIS IS NOT AN ORDER

MAIL OR DELIVER TO:  
DEPARTMENT OF PURCHASING & CONTRACTING  
COUNTY OF SAN DIEGO, RFB NO. 4950  
10089 WILLOW CREEK ROAD, SUITE 150  
SAN DIEGO, CA 92131

FOR INFORMATION, PLEASE CALL  
JOSIELYN KAAI 858.537.2570

AWARD WILL BE MADE TO THE LOWEST, RESPONSIVE  
RESPONSIBLE BIDDER BASED ON:

BID OPENING DATE:  
MARCH 29, 2011, 11:00 AM LOCAL TIME

- ALL OR NONE
- EACH LOT
- TOTAL PRICE
- EACH ITEM
- OTHER (SEE PRICE SCHEDULE)

RFB 4950 MUST BE RECEIVED AT THE ABOVE  
ADDRESS BEFORE 11:00 AM ON MARCH 29, 2011

PLEASE STATE YOUR LOWEST PRICE  
F.O.B. DESTINATION AND BRAND NAME  
OR TRADE NAME IF APPLICABLE

(PEASE USE TYPEWRITER OR BLACK INK)  
YOUR ENVELOPE MUST INCLUDE RFB NO. 4950

DESCRIPTION

The County of San Diego is requesting bids from qualified firms to provide broker/consultant services to the In Home Supportive Services Public Authority (PA) insurance plans, including health and welfare plans for PA employees.

CONTRACT PERIOD

The proposed contract term is an initial term of one (1) year (07/01/11 to 06/30/12) with four (4) additional one-year renewal options through 06/30/16 and up to an additional six (6) months, if necessary, at the end of the agreement.

PRE-BID CONFERENCE

A pre-bid conference will be held on **Friday, March 11, 2011, 1:00 PM** at the offices of the County of San Diego Department of Purchasing and Contracting, 10089 Willow Creek Road, Suite 150, San Diego, CA 92131. Questions regarding process will be addressed and requests for clarification related to definition or interpretation of this RFB shall be requested in writing and submitted via e-mail to [josielyn.kaai@sdcounty.ca.gov](mailto:josielyn.kaai@sdcounty.ca.gov).

***TYPE OR USE BLACK INK TO COMPLETE THE OFFEROR INFORMATION BELOW***

Offeror hereby acknowledges receipt of the RFB and Addenda Number 1 through [ 1 ].

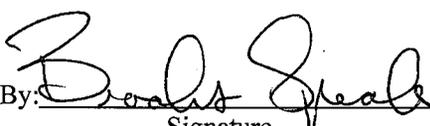
OFFEROR INFORMATION:

AUTHORIZATION FOR OFFER (Must be signed):

Firm Name: ONE Total Insurance Sol.

Street: 1791 Third Street

City/State/Zip: Norco, CA 92860

By:  3/25/11  
Signature Offer Date

Phone No: (951) 547-6777 Fax No: (951) 547-6751 Name: Brooks Speake

E-mail Address: [tvaughn@onetotalsolution.com](mailto:tvaughn@onetotalsolution.com) Title: President

Contact Person (If other than above):

Name: Theresa Vaughn Phone No: ( ) same FAX: ( ) same

Title: Benefit Consultant

E-Mail Address: same

**NOTE:** RFBs, associated documents and addenda may be obtained from the Department of Purchasing and Contracting at 10089 Willow Creek Road, Suite 150, San Diego, California 92131-1699 or by downloading from the department's Web site "BUYNET" at [www.sdcounty.ca.gov](http://www.sdcounty.ca.gov). It is the Offerors responsibility to periodically check the Web site for addendum that may be issued to implement changes or clarification to the RFB, prior to the due date.

**SUBMIT THIS COMPLETED FORM AS THE COVER PAGE OF THE BID**

**Representations & Certifications**

**Contract Conflict Certification**

**Tax Withholding**

**Pricing Schedule**

**County of  
San Diego**

**03/29/2011**

County of San Diego  
Department of Purchasing and Contracting  
**REPRESENTATIONS AND CERTIFICATIONS**

The following representations and certifications are to be completed, signed and returned with the offer.

**1. NOT-FOR-PROFIT ORGANIZATIONS**

Attach proof of status and omit Paragraph 3.

**2. INTERLOCKING DIRECTORATE**

In accordance with Board of Supervisors Policy A-79, if Offeror is a non-profit as indicated in paragraph 1 above, Offeror is required to identify any related for-profit subcontractors in which an interlocking directorate, management or ownership relationship exists. By submission of this offer, Offeror certifies it will not enter into a subcontract relationship with a related for-profit entity if Offeror is a non-profit entity. If Offeror is a non-profit and will be subcontracting with a related for-profit entity, Offeror must list the entity(ies) below and the contract must be approved by the Board of Supervisors

List of for-profit entity(ies):

N/A

If more than 1, attach a separate sheet listing them all.

**3. BUSINESS REPRESENTATION**

**3.1. DEFINITION OF A DISABLED VETERANS BUSINESS ENTERPRISE**

"Disabled Veterans Business Enterprise" means a business which is at least fifty-one (51%) owned and operated by one or more veterans with a service related disability as certified by Equal Opportunity Management Office (EOMO), California Department of General Services, Office of Small Business and members of Joint Agencies Contracting Opportunities (JACO), (California Military and Veterans code, Article 6, section 999).

**3.2. REPRESENTATION AS DISABLED VETERANS BUSINESS ENTERPRISE**

This Offeror represents as a part of this offer that the ownership, operation and control of the business are in accordance with the specific definition in 3.1. I am currently certified by (Government Agency):

Certification #: N/A

**4. CERTIFICATE REGARDING DEBARMENT, SUSPENSION AND RELATED MATTERS**

Offeror hereby certifies to the best of its knowledge that neither it nor any of its officers:

**4.1.** Are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency; and

**4.2.** Have within a three (3) year period preceding this agreement been convicted of or had a civil judgment rendered against them for commission of fraud or criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property; and

**4.3.** Are presently indicted for or otherwise criminally or civilly charged by a government entity (Federal, State, or local) with the commission of any of the offenses enumerated in paragraph 4.2 of this certification; and

**4.4.** Have within a three (3) year period preceding this agreement had one or more public transactions (Federal, State or local) terminated for cause or default.

**4.5.** Are presently the target or subject of any investigation, accusation or charges by any Federal, State or local law enforcement, licensing or certification body and if they are, the appropriate information is included in the proposal, as requested in the Submittal Requirements.

**4.6.** Contractor will report in writing to the County Department of Purchasing and Contracting within five business days of knowing or have any reason to know any change in status as certified in the preceding paragraphs 4.1 through 4.5, and that occur prior to award (in the case of bids) and contract execution (in the case of negotiated procurements).

**5. CERTIFICATE OF CURRENT COST OR PRICING**

This is to certify that, to the best of my knowledge and belief, cost and/or pricing data submitted with this offer, or specifically identified by reference if actual submission of the data is impracticable, is/are accurate, complete, and current as of the date signed below.

**6. CERTIFICATE OF INDEPENDENT PRICING**

By submission of this offer, each Offeror certifies, and in the case of a joint offers, each party thereto certifies as to its own organization, that in relation to this procurement:

**6.1.** The prices in this offer have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with other Offeror; with any competitor; or with any County employee(s) or consultant(s) involved in this or related procurements; and

**6.2.** Unless otherwise required by law, the prices which have been quoted in this offer have not been knowingly disclosed by the Offeror and will not knowingly be disclosed by the Offeror prior to opening, in the case of a bid, or prior to award, in the case of a proposal, directly or indirectly to any other Offeror or to any competitor; and

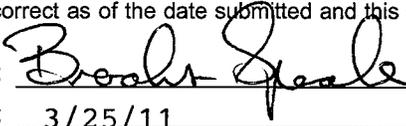
**6.3.** No attempt has been made or will be made by the Offeror to induce any other person or firm to submit or not to submit an offer for the purpose of restricting competition.

**7.** The Offeror understands that prior to receiving a contract award from the County, the Offeror must submit a completed IRS W-9 form to provide a Federal Tax ID number, or if not available, to provide a Social Security Number (SSN).

**CERTIFICATION**

The information furnished in Paragraphs 1 through 7 is certified to be factual and correct as of the date submitted and this certification is made under penalty of perjury under the laws of the State of California.

Name: Brooks Speake

Signature: 

Title: President

Date: 3/25/11

Company/Organization: ONE Total Insurance Solution

**SUBMIT THIS FORM AS DIRECTED IN THE REQUEST FOR SOLICITATION DOCUMENTS OR WITH THE OFFER**

REQUEST FOR BID (RFB) NO. 4950  
IN-HOME SUPPORTIVE SERVICES PUBLIC AUTHORITY  
BENEFITS BROKER / CONSULTANT

**CONTRACT CONFLICT CERTIFICATION**

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**THE FOLLOWING CONTRACT CONFLICT CERTIFICATION IS TO BE COMPLETED, SIGNED AND RETURNED AS DIRECTED IN THE REQUEST FOR SOLICITATION DOCUMENTS OR WITH THE OFFER. FAILURE TO COMPLY MAY RESULT IN YOUR SUBMITTAL OR YOUR OFFER BEING REJECTED.**

**Please attach your disclosure(s) to this certification for the following three items. If you have no disclosures please write "NONE" above the below signature block.**

1. The name, contract number, and short description of all Contracts You have or have had with the Public Authority which involves the same or similar subject matter as is involved in this procurement.
2. The name, contract number, and short description of all Contracts that any of Your employees have or have had with the Public Authority and which involve the same or similar subject matter as is involved in this procurement.
3. The name, contract number, and short description of all Contracts that Your spouse has or has had with the Public Authority and which involve the same or similar subject matter as is involved in this procurement.

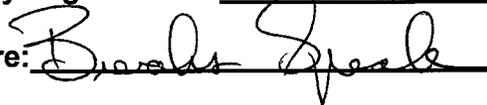
For purposes of this certification the following terms shall be defined as:

"Contracts" means any memoranda of understanding, memoranda of agreement, letter agreements, contracts, sub-contracts, consultant agreements or agreements in any form, whether written or oral.

"You" or "Your" means i) for individuals, the individual and any partnership, corporation, or limited liability partnership of which the individual is a member or shareholder, and ii) for other legal entities, the entity itself and any partnership, corporation, or limited liability partnership of which the legal entity is a member or shareholder.

I certify under penalty of perjury under the laws of the State of California that the information attached hereto and disclosed in accordance with this certification is true and correct.

**Company/Organization:** ONE Total Insurance Solution

**Signature:** NONE  **Date:** 3/25/11

**Name:** Brooks Speake **Title:** President

**SUBMIT THIS FORM AS DIRECTED IN THE REQUEST FOR SOLICITATION DOCUMENTS OR WITH THE OFFER**

**REQUEST FOR BID (RFB) NO. 4950  
IN-HOME SUPPORTIVE SERVICES PUBLIC AUTHORITY  
BENEFITS BROKER / CONSULTANT**

**TAX WITHHOLDING**

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**“California Revenue and Taxation Code Section 18662.**

In compliance with California Revenue and Taxation code section 18662, if you are a non resident of California (out-of-state invoices) who receives California source income, the County will pay California Use Tax directly to the State of California per permit no. SR FH 25-632384. Fifteen (15) business days prior to the first payment, new suppliers or suppliers with expired forms or forms with incorrect information, must submit new forms to the County (forms are available from the Franchise Tax Board website listed below).

Under certain circumstances you may be eligible for reduced or waived nonresident withholding. If you have already received a waiver or a reduced withholding response from the State of California and the response is still valid, submit the response to the County in lieu of the forms. Failure to submit the required forms will result in withholding of payments. Refer to the Franchise Tax Board websites (listed below) for tax forms and information on nonresident withholding, including waivers or reductions. The County will not give you any tax advice. It is recommended you speak with your tax adviser and/or the State of California for guidance.

**Franchise Tax Board Websites:**

<http://www.ftb.ca.gov>

[http://www.ftb.ca.gov/individuals/Withholding\\_Definitions.shtml](http://www.ftb.ca.gov/individuals/Withholding_Definitions.shtml)

[http://www.ftb.ca.gov/individuals/wsc/Processing\\_Changes\\_for\\_2010.shtml](http://www.ftb.ca.gov/individuals/wsc/Processing_Changes_for_2010.shtml)

[http://www.ftb.ca.gov/individuals/wsc/forms\\_and\\_publications.shtml](http://www.ftb.ca.gov/individuals/wsc/forms_and_publications.shtml)

[http://www.ftb.ca.gov/individuals/wsc/decision\\_chart.shtml](http://www.ftb.ca.gov/individuals/wsc/decision_chart.shtml)

**Submit forms to the Auditor & Controller via fax at (619) 531-5417 or mail originals to: County of San Diego, 1600 Pacific Hwy, Room 061, San Diego, CA 92101. The P.O. Number or Contract Number (if available) and “California Revenue and Taxation Code Section 18662” must appear on fax cover sheet and/or the outside of the mailing envelope.”**

**REQUEST FOR BID (RFB) NO. 4950  
IN-HOME SUPPORTIVE SERVICES PUBLIC AUTHORITY  
BENEFITS BROKER / CONSULTANT**

**SECTION A – PRICING SCHEDULE**

Contract Period	Commission Ceiling – Annual Amount
Initial Term: 07/01/11 through 06/30/12	\$3,949 Annually
Option Year 1: 07/01/12 through 06/30/13	\$3,949 Annually
Option Year 2: 07/01/13 through 06/30/14	\$3,949 Annually
Option Year 3: 07/01/14 through 06/30/15	\$3,949 Annually
Option Year 4: 07/01/15 through 06/30/16	\$3,949 Annually
TOTAL of all years (Basis of award):	\$15,796

FOR INTIAL PERIOD OF JULY 1, 2011 THROUGH JUNE 30, 2012

1. **COMPENSATION.** Consultant shall provide consulting and broker services as listed in Exhibit A of the Statement of Work at the estimated annual contract amount not to exceed \$ 3949 for the period of July 1, 2011 through June 30, 2012. No other costs shall be reimbursed to Consultant during the aforementioned period. If aggregate fees exceed \$ 3949 during the aforementioned period, Consultant will continue to work at no cost to the Public Authority for the remainder of the contract year.
  
2. **COMPENSATION.** Fees will be charged against the commissions paid for Public Authority's health and welfare benefit plans. Offeror agrees that the sum total of any commissions collected during the contract year in excess of \$ 3949 will be refunded to Public Authority no later than July 31, following the contract year ending June 30 of the same year. Alternatively, if Offeror receives less than \$ 3949 in commissions, the Public Authority will pay to Offeror the difference net thirty (30) days from receipt of the Offerors annual accounting, and a properly completed invoice. Offeror agrees that its firm will reimburse the Public Authority this fee from any contingent commissions they receive from any insurance company and/or third party administrator who holds a contract with the Public Authority in accordance with the extent to which Public Authority premiums paid during the contract period relate to total premiums paid by all Small Business Division accounts of Offeror with such carrier or carriers.

NEXT BID

SECTION A  
COUNTY OF SAN DIEGO REQUEST FOR BID  
THIS IS NOT AN ORDER

MAIL OR DELIVER TO:  
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COUNTY OF SAN DIEGO, RFB NO. 4950  
10089 WILLOW CREEK ROAD, SUITE 150  
SAN DIEGO, CA 92131

FOR INFORMATION, PLEASE CALL  
JOSIELYN KAAI 858.537.2570

AWARD WILL BE MADE TO THE LOWEST, RESPONSIVE  
RESPONSIBLE BIDDER BASED ON:

BID OPENING DATE:  
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- ALL OR NONE
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**TYPE OR USE BLACK INK TO COMPLETE THE OFFEROR INFORMATION BELOW**

Offeror hereby acknowledges receipt of the RFB and Addenda Number 1 through [ ].

OFFEROR INFORMATION:

AUTHORIZATION FOR OFFER (Must be signed):

Firm Name: Barney + Barney, LLC  
Street: 9171 Towne Centre Dr. #500  
City/State/Zip: San Diego, CA 92117

By: [Signature] 3/28/11  
Signature Offer Date

Phone No: 858 581-7434 Fax No: 858 909-9774

Name: Diana Twadell  
Title: Principal

E-mail Address:

Contact Person (If other than above):

Name:

Phone No: ( )

FAX: ( )

Title:

E-Mail Address:

**NOTE:** RFBs, associated documents and addenda may be obtained from the Department of Purchasing and Contracting at 10089 Willow Creek Road, Suite 150, San Diego, California 92131-1699 or by downloading from the department's Web site "BUYNET" at [www.sdcounty.ca.gov](http://www.sdcounty.ca.gov). It is the Offerors responsibility to periodically check the Web site for addendum that may be issued to implement changes or clarification to the RFB, prior to the due date.

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# REPRESENTATIONS AND CERTIFICATIONS

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List of for-profit entity(ies): \_\_\_\_\_

If more than 1, attach a separate sheet listing them all.

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**3.1. DEFINITION OF A DISABLED VETERANS BUSINESS ENTERPRISE**

"Disabled Veterans Business Enterprise" means a business which is at least fifty-one (51%) owned and operated by one or more veterans with a service related disability as certified by Equal Opportunity Management Office (EOMO), California Department of General Services, Office of Small Business and members of Joint Agencies Contracting Opportunities (JACO), (California Military and Veterans code, Article 6, section 999).

**3.2. REPRESENTATION AS DISABLED VETERANS BUSINESS ENTERPRISE**

This Offeror represents as a part of this offer that the ownership, operation and control of the business are in accordance with the specific definition in 3.1. I am currently certified by (Government Agency): \_\_\_\_\_

Certification #: \_\_\_\_\_

**4. CERTIFICATE REGARDING DEBARMENT, SUSPENSION AND RELATED MATTERS**

Offeror hereby certifies to the best of its knowledge that neither it nor any of its officers:

- 4.1. Are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency; and
- 4.2. Have within a three (3) year period preceding this agreement been convicted of or had a civil judgment rendered against them for commission of fraud or criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property; and

4.3. Are presently indicted for or otherwise criminally or civilly charged by a government entity (Federal, State, or local) with the commission of any of the offenses enumerated in paragraph 4.2 of this certification; and

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4.5. Are presently the target or subject of any investigation, accusation or charges by any Federal, State or local law enforcement, licensing or certification body and if they are, the appropriate information is included in the proposal, as requested in the Submittal Requirements.

4.6. Contractor will report in writing to the County Department of Purchasing and Contracting within five business days of knowing or have any reason to know any change in status as certified in the preceding paragraphs 4.1 through 4.5, and that occur prior to award (in the case of bids) and contract execution (in the case of negotiated procurements).

**5. CERTIFICATE OF CURRENT COST OR PRICING**

This is to certify that, to the best of my knowledge and belief, cost and/or pricing data submitted with this offer, or specifically identified by reference if actual submission of the data is impracticable, is/are accurate, complete, and current as of the date signed below.

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6.1. The prices in this offer have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with other Offeror; with any competitor; or with any County employee(s) or consultant(s) involved in this or related procurements; and

6.2. Unless otherwise required by law, the prices which have been quoted in this offer have not been knowingly disclosed by the Offeror and will not knowingly be disclosed by the Offeror prior to opening, in the case of a bid, or prior to award, in the case of a proposal, directly or indirectly to any other Offeror or to any competitor; and

6.3. No attempt has been made or will be made by the Offeror to induce any other person or firm to submit or not to submit an offer for the purpose of restricting competition.

7. The Offeror understands that prior to receiving a contract award from the County, the Offeror must submit a completed IRS W-9 form to provide a Federal Tax ID number, or if not available, to provide a Social Security Number (SSN).

## CERTIFICATION

The information furnished in Paragraphs 1 through 7 is certified to be factual and correct as of the date submitted and this certification is made under penalty of perjury under the laws of the State of California.

Name: Diana Trudell

Signature: [Signature]

Title: Principal

Date: 3-28-11

Company/Organization: Barney + Barney, LLC

**SUBMIT THIS FORM AS DIRECTED IN THE REQUEST FOR SOLICITATION DOCUMENTS OR WITH THE OFFER**

REQUEST FOR BID (RFB) NO. 4950  
IN-HOME SUPPORTIVE SERVICES PUBLIC AUTHORITY  
BENEFITS BROKER / CONSULTANT

CONTRACT CONFLICT CERTIFICATION

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Please attach your disclosure(s) to this certification for the following three items. If you have no disclosures please write "NONE" above the below signature block.

1. The name, contract number, and short description of all Contracts You have or have had with the Public Authority which involves the same or similar subject matter as is involved in this procurement.
2. The name, contract number, and short description of all Contracts that any of Your employees have or have had with the Public Authority and which involve the same or similar subject matter as is involved in this procurement.
3. The name, contract number, and short description of all Contracts that Your spouse has or has had with the Public Authority and which involve the same or similar subject matter as is involved in this procurement.

For purposes of this certification the following terms shall be defined as:

"Contracts" means any memoranda of understanding, memoranda of agreement, letter agreements, contracts, sub-contracts, consultant agreements or agreements in any form, whether written or oral.

"You" or "Your" means i) for individuals, the individual and any partnership, corporation, or limited liability partnership of which the individual is a member or shareholder, and ii) for other legal entities, the entity itself and any partnership, corporation, or limited liability partnership of which the legal entity is a member or shareholder.

I certify under penalty of perjury under the laws of the State of California that the information attached hereto and disclosed in accordance with this certification is true and correct.

Company/Organization: Barney + Barney, LLC  
Signature: Diana Twadell Date: 3-28-11  
Name: Diana Twadell Title: Principal

SUBMIT THIS FORM AS DIRECTED IN THE REQUEST FOR SOLICITATION DOCUMENTS OR WITH THE OFFER

**REQUEST FOR BID (RFB) NO. 4950  
IN-HOME SUPPORTIVE SERVICES PUBLIC AUTHORITY  
BENEFITS BROKER / CONSULTANT**

**SECTION A – PRICING SCHEDULE**

Contract Period	Commission Ceiling – Annual Amount
Initial Term: 07/01/11 through 06/30/12	\$ 33,000 <sup>00</sup>
Option Year 1: 07/01/12 through 06/30/13	\$ 34,000 <sup>00</sup>
Option Year 2: 07/01/13 through 06/30/14	\$ 30,000 <sup>00</sup>
Option Year 3: 07/01/14 through 06/30/15	\$ 30,000 <sup>00</sup>
Option Year 4: 07/01/15 through 06/30/16	\$ 31,000 <sup>00</sup>
TOTAL of all years (Basis of award):	\$ 158,000 <sup>00</sup>

FOR INTIAL PERIOD OF JULY 1, 2011 THROUGH JUNE 30, 2012

1. **COMPENSATION.** Consultant shall provide consulting and broker services as listed in Exhibit A of the Statement of Work at the estimated annual contract amount not to exceed \$33,000<sup>00</sup> for the period of July 1, 2011 through June 30, 2012. No other costs shall be reimbursed to Consultant during the aforementioned period. If aggregate fees exceed \$33,000<sup>00</sup> during the aforementioned period, Consultant will continue to work at no cost to the Public Authority for the remainder of the contract year.
  
2. **COMPENSATION.** Fees will be charged against the commissions paid for Public Authority's health and welfare benefit plans. Offeror agrees that the sum total of any commissions collected during the contract year in excess of \$33,000<sup>00</sup> will be refunded to Public Authority no later than July 31, following the contract year ending June 30 of the same year. Alternatively, if Offeror receives less than \$18,000<sup>00</sup> in commissions, the Public Authority will pay to Offeror the difference net thirty (30) days from receipt of the Offerors annual accounting, and a properly completed invoice. Offeror agrees that its firm will reimburse the Public Authority this fee from any contingent commissions they receive from any insurance company and/or third party administrator who holds a contract with the Public Authority in accordance with the extent to which Public Authority premiums paid during the contract period relate to total premiums paid by all Small Business Division accounts of Offeror with such carrier or carriers.

Presented by



Addendum: Additional Information for

# IHSS Public Authority

RFB Number 4950



**BARNEY&BARNEY™ LLC**

**Diana Twadell**  
Principal  
Small Business Division

t: 858.587.7434  
f: 858.909.9774  
dianat@barneyandbarney.com



...An Assurex Global Partner

CONFIDENTIAL

March 28, 2011

Department of Purchasing and Contracting  
10089 Willow Creek road, Suite 150  
San Diego, CA 92131-1699

To Whom It May Concern:

Selecting a new insurance broker is an important task, and selecting the right partner is crucial. In answering your questions and responding to your requirements we have paid attention to the technical requirements and the business issues that will define an effective solution for your insurance needs.

Our proposal presents recommendations to meet IHSS Public Authority's requirements. Barney & Barney agrees to provide all services within the Scope of Work under Section 2, Exhibit A, of RFB 4950. In addition, Barney & Barney is in compliance with all insurance and bonding requirements listed in Exhibit B of RFB 4950 and can furnish required documentation upon request.

Our proposal also provides you with an overview of our capabilities and experience and outlines Barney & Barney's differentiators. We are confident not only that we can deliver the results you are looking for, but that we can provide significant value for you in the process.

In addition, Barney & Barney is committed to exceeding your expectations through teamwork, innovation and industry leadership. We believe these are important factors to consider as you make your decision. After all, in many ways, the solution is inseparable from the provider.

Thank you for the opportunity to submit the enclosed response to your Request for Bid. We look forward to the opportunity to review our proposal with you in detail and to implement the recommendations we are making.

Sincerely,



Diana Twadell  
Principal, Small Business Division



## History

In 1909, Phillip Barney founded a small insurance company in San Diego. Shortly thereafter, Phillip's brother joined him, creating the lasting name of Barney & Barney. What started out as a small family business steadily grew over the years to become one of the most successful brokerages in the United States.

The steady growth of the firm enjoyed the 1930s and '40s, accelerated in the 1950s with the execution of Barney and Barney's perpetuation plan, designed to promote growth by bringing younger people into the partnership as equity owners. In the late '60s, Barney & Barney shifted from simply selling one insurance company's products to brokering business for several carriers.

Since then, the growth in professional liability and employee benefits has brought new opportunities to Barney & Barney, and the company has continued to grow at a remarkable rate.

## Ownership Structure

Barney & Barney is a privately held firm with 37 Principals who are active in daily operations and committed to maintaining steady, organic growth. Remaining private allows us to be accountable only to our clients, not stockholders or a distant corporate headquarters. It also allows clients direct access to our owners, assuring client focus and relationship stability. The Principals are active in the community and serve on various Boards and Advisory Boards representing a number of causes and industries.

We are committed to private ownership and believe this is the ideal structure of a professional services firm for our clients and employees.

## Organizational Structure

Barney & Barney LLC is a full service insurance brokerage and consulting firm that has been helping organizations with their insurance, risk management and employee benefits needs for over 100 years. Headquartered in San Diego, Barney & Barney has additional offices in Orange County and the Bay Area. We are proudly ranked #29 on *Business Insurance's* list of 100 Largest U.S. Brokers.

Service is delivered by client teams that provide expertise, responsiveness and cost-effective solutions focused on the particular needs of each client. Our associates work as insurance consultants to the client's management team, providing practical, innovative solutions, as well as sound advice. Our firm is organized into the following operating divisions:



FULL SERVICE  
BROKER

Employee Benefits  
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Property & Casualty  
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Executive Risk  
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Compensation Consulting  
-----  
Specialty Services  
-----  
Retirement Services  
-----  
Workers' Compensation  
-----  
Risk & Loss Advisors  
-----  
Programs/Alternative Risk  
-----  
Individual Insurance

As a full service insurance brokerage and consulting firm, we are able to address all of our clients' insurance needs. Each operating division is organized into client-focused teams that deliver unmatched service to clients. Our unique structure allows us the ability to help clients in any stage of their business.

### Philosophy/Culture

Our mission statement lays the groundwork for our service philosophy:

As a client-focused professional service firm, Barney & Barney's underlying mission is to assess and manage risks in a manner that enables our clients to fulfill their corporate visions. Our principal method to achieve this goal is to listen to each client in order to understand their vision and to develop risk solutions in a broad and effective working partnership with them.

Barney & Barney has recently furthered our mission statement to embody "the 3 Cs."

We exist to serve:

- **Our Clients:** We are committed to understanding the needs of our clients and exceeding their expectations by delivering exceptional service, high quality products and professional advice. Our clients drive everything we do.
- **Our Colleagues:** Our colleagues are our most valuable asset. We commit resources to enriching our colleague's experience by involving them in the business decisions of our company as well as supporting their desire for a balanced life. Barney & Barney recently took top honors in the Large Business Category as one of San Diego's "Best Places to Work" by the San Diego Business Journal.
- **Our Community:** We provide leadership and support to the community in civic, economic and community activities.



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Our client service philosophy is reflected in our corporate values:

**Integrity**

We are always honest and trustworthy. We stand by our word.

**Accountability**

We take personal responsibility for the unique needs of our clients; we see what needs to be done, do it accurately, and take it to completion. We fulfill the commitments that we make.

**Excellence**

We aggressively pursue new standards of professional service and advice. We encourage learning and professional development; supported by positive leadership, open communication and recognition of each other's efforts.

**Fairness**

We treat each other, our clients, and our business partners with fairness, dignity and respect, without regard to title, status or individual beliefs.

**Creativity**

We understand problems beyond their immediate scope, and leverage our resources to deliver innovative solutions.

**Teamwork**

We are committed to working as a team to exceed the expectations of our clients. We celebrate diversity, and by combining our unique strengths, we deliver exceptional results.

**Community Involvement**

We provide leadership and support to the San Diego community in civic, economic and community activities.

**Attitude**

We are enthusiastic professionals, dedicated to our work. We remain positive and constructive as we fulfill our commitments.

**The Barney & Barney Foundation**

In 2009 we reached our 100th year of business and solidified our commitment to philanthropy by creating the Barney & Barney Foundation. The Barney & Barney Foundation is committed to giving back to the community – to increase opportunity, support our youth, protect the environment and advance the arts. From an industry accustomed to handling risk, Barney & Barney has created the Foundation as a means to create possibility in the world in order to ensure a brighter future.

We believe that remaining active in the overall community improves the lives of our neighbors and promotes good business relationships. Many members of our management team and associates hold positions on Boards of Directors, Advisory Boards and act as Committee Chairs

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for several professional and charitable organizations. Our commitment is such that we commit substantial time and monetary resources to more than 250 organizations.

Some of our previous recipients are:

2010

- The Bay Institute
- Casa De Amparo
- Center for Community Solutions
- MAAC Project
- Operation Homefront
- PLAYWORKS
- The Ronald McDonald House
- Talk About Curing Autism

2009

- San Diego Hospice and The Institute for Palliative Medicine
- Rady Children's Hospital
- Walden Family Services
- Neighborhood House Association

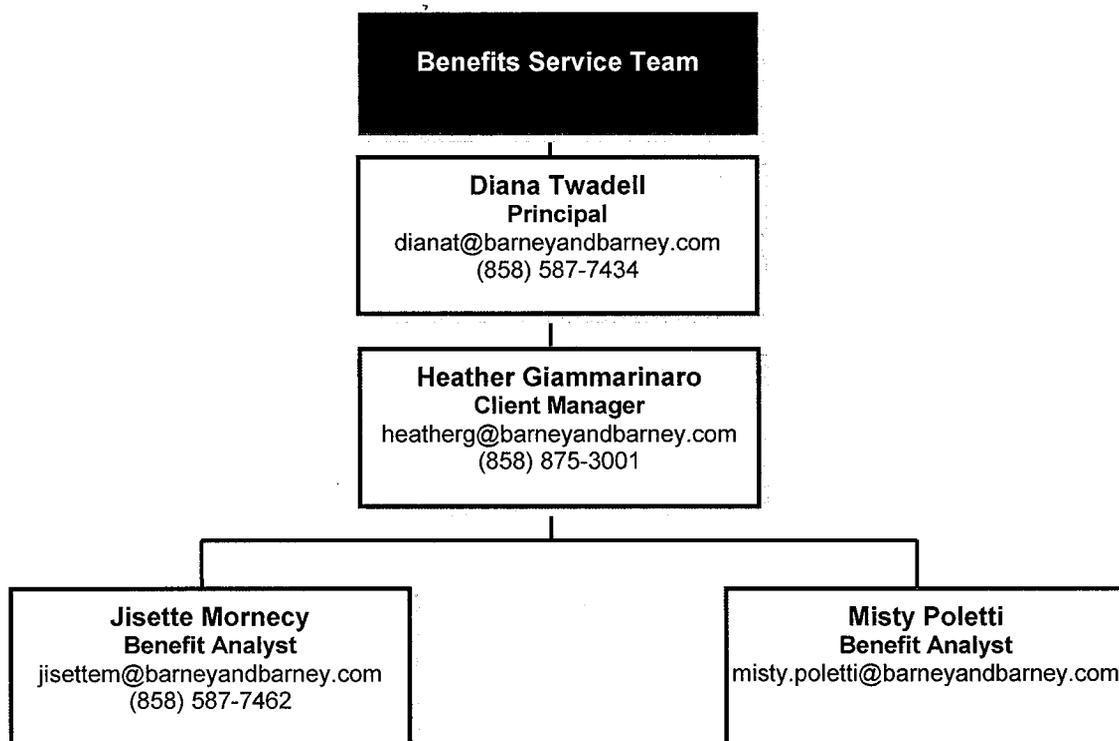
### **Experience and Reputation**

Over the years we have been recognized for our expertise, integrity and marketplace ethics. Among the numerous awards we have won are:

- IIAA Best Performing Agency Award – 2011 National Award
- "Best Overall Agency to Work For," *Insurance Journal*, 2010
- "Commercial Insurance Agency of the Year," National Underwriter, 2006
- "PAR Excellence Award in Quality Management," 15-time recipient of the Assurex Award
- "100 Fastest Growing Privately Held Companies," *San Diego Business Journal*; recognized for the past 7 years
- Better Business Bureau Torch Award for Marketplace Ethics, multiple-time recipient
- Better Business Bureau Business Integrity Award
- "Best Places to Work," Large Employer Category, *San Diego Business Journal*
- Professional Women in Insurance Employer of the Year Award
- "Best Practices," Independent Insurance Agents & Brokers of America, multiple-time recipient

## Service Team

We see ourselves as an extension of your Human Resources department and therefore a part of your extended team. Our goal is to provide a level of service and satisfaction that demonstrates nothing less than the best insurance consulting and support system available. Using the team-based approach, we are able to take advantage of our associates' wide variety of backgrounds, experience, education and training. This model delivers a merging of specialists with industry expertise to work with you and guarantee quality control and continuity of service from year to year. All members of your team will be fully accessible to IHSS Public Authority on a daily basis. In an effort to increase our efficiency and lower paper waste, we work in a paperless environment. We take pride in our standard less-than-24-hour turnaround on typical phone requests and email responses. Your Barney & Barney team is identified in the organization chart below:



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## Wellness

Barney & Barney advocates for our clients to implement a Health, Wellness & Productivity program as a way to raise awareness of Wellness, Health and Productivity Management and Employee Engagement.

The Barney & Barney team has a great deal of experience implementing effective Wellness Programs. Their services are included in our basic services. Our director of Health Management/Wellness, Miki Kobane, will go through our Health Management & Productivity Scorecard to determine the needs of IHSS Public Authority. Miki Kobane's services are available without fee for initial consultations. Thereafter, there may be an hourly fee for her services, depending on the scope of her services needed.

Wellness is a focused part of our business and we will bring together all the programs and services IHSS Public Authority is already offering for a highly customized and most importantly, an effective solution for your employees. The foundation of our approach to wellness will more closely align IHSS Public Authority's culture and leverage the skills within your workforce to create even more productive and healthier employees.

## Health Fairs

Barney & Barney is an advocate of implementing Health & Wellness Programs in the workplace. Healthy employees are more productive, have a lower rate of absenteeism and are less likely to over-utilize benefit programs.

An effective method for engaging employee is holding an annual or bi-annual health fair to educate employees on resources and provide a fun, encouraging environment for communicating the importance of wellness.

Barney & Barney will assist IHSS Public Authority with the planning, scheduling, coordinating and holding of annual or bi-annual health fairs.

## Keep the Healthy, Healthy

Long-term studies have shown that the most effective financial returns from wellness programs stem from keeping the healthy population healthy, rather than focusing on the sick and high risk. This means engaging the entire population, across all risk areas. Barney & Barney's approach maximizes preventive engagement by employing fun programs, incentives, unlimited group campaigns and – most importantly – an approach people can make work for them long-term.

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## Measure what Matters

“Wellness” typically targets an extremely limited set of health factors. Barney & Barney addresses not only health, but evidence-based drivers of well-being and performance. In fact, our assessment is **10 times** more predictive of productivity than health risk-only approaches. This also deepens the understanding of IHSS Public Authority’s risk factors as it relates to your insurance costs. We take this knowledge and further develop targeted programs to mitigate or eliminate these risks and help employees become outstanding contributors to the organization and their families.

## Easy

In the past, Wellness was often difficult to implement and manage. We simplify this process and build the right solution based on IHSS Public Authority’s needs and include many of the resources you’re already paying for through your insurance carriers. Our approach is easy to launch and modular, so you can start and grow with very little effort. We bring all of the great services and programs you are already offering together to further balance and enhance your employee’s lives.

Barney & Barney is on the leading edge of designing health and welfare wellness programs for our clients. Our dedicated Health Management Practice is designed to keep the healthy, healthy through behavior modification and change while driving employee engagement.

We can offer IHSS Public Authority the implementation of the above Wellness and Engagement system, as well as:

- Consulting by our Certified Director of Health and Productivity
- Health Management analysis
- Full service implementation
- Vendor screening and facilitation
- Insurance carrier liaison

Because of our holistic and customized approach to health management, we have established exclusive relationships with vendors that are equally as committed to supporting our clients and their unique cultures. The programs we would recommend have the capabilities of engaging and incentivizing employees in a number of ways. After we assess IHSS Public Authority’s unique wellness needs, we guide you to the best program for the results you are seeking.

## Results

The results of our wellness approach are exciting. Recently implemented programs have achieved:

- 92% assessment completion
- Significant and on-going program participation
- Immediate ROI through cost saving mechanisms



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## References

Ronald McDonald House of San Diego

Marketing, Implementation and Management of Benefits program for approximately 30 employees of local Ronald McDonald House location since 2009

Contact: Gail Sullivan, CFO

(858) 598-2431 Direct Line

gsullivan@rmhsd.org

Council of Community Clinics

Marketing, Implementation and Management of Benefits program for approximately 45 employees of non-profit support and purchasing coalition for local community clinics since 2003

Contact: Tracy Garmer, Director of Human Resources

(619) 542-4349 Direct Line

tgarmer@cccscd.org

Photothera

Marketing, Implementation and Management of Benefits program for approximately 35 employees of medical device company since 2006

Contact: Julie Pashkowsky, Director of Finance and Administration

(760) 692-4911 Direct Line

jpashkowsky@photothera.com

***Barney & Barney has been the insurance broker of the YMCA of San Diego County for more than 47 years. They understand the unique needs of non-profits and apply that knowledge and experience to developing comprehensive and cost effective insurance programs for our association.***

**– Rich Collato, CEO, YMCA of San Diego County**