

**Attachment 18**

**Mandatory Minimum Requirements for Proposers Checklist**

	<b>Minimum Requirement</b>	<b>N/A</b>	<b>Yes</b>	<b>No</b>
<b>1.</b>	<b>Does the Bidder have at least one or more physical office locations within California at the time the submission is made?</b>			
<b>2.</b>	<b>Will Bidder Continue to maintain at least one or more physical office locations within California during the term of any contract awarded pursuant to this RFP?</b>			
<b>3.</b>	<b>Does Bidder possess appropriate licensure as an insurance broker or agent from the California Department of Insurance? The successful Bidder shall maintain all requisite licensure at all times during the term of any contract awarded pursuant to this RFP.</b>			
<b>4.</b>	<b>Did bidder provide a valid Department of Insurance license number with the bidder's submission?</b>			
<b>5.</b>	<b>Is the Bidder registered with the State of California, Secretary of State? (If required by law.)</b>			
<b>6.</b>	<b>Did the Bidder provide an organizational chart of the proposed adequately staffed team that includes: Name, title, role of all personnel including any subcontractors, back-up personnel, or consultant firms who will be assigned to the State program and personnel listed in <u>C. Mandatory Minimum Requirements for Bidders, items 6.a. and 6.b.</u> (see <u>Attachment 11-Organizational Chart</u>)?</b>			
<b>6.a.</b>	<b>Did Bidder identify the person identified in <u>C. Mandatory Minimum Requirements for Bidders, item 6.a.</u>?</b>			
<b>6.b.</b>	<b>Did Bidder identify the Account Manager identified in <u>C. Mandatory Minimum Requirements for Bidders, item 6.b</u></b>			
<b>7.</b>	<b>Does the person identified in <u>C. Mandatory Minimum Requirements for Bidders, item 6.a.</u> have at least 10 years of experience in marketing, underwriting, designing OCIP programs and performing other insurance/risk management related services as defined in this RFP that also resides in California?</b>			
<b>8.</b>	<b>Does the Account Manager identified in <u>C. Mandatory Minimum Requirements for Bidders, item 6.b.</u> have at least 10 years of experience with day-to-day OCIP program management that includes administration oversight,</b>			

	<b>contractor enrollment, and coordination of other activities as required in this RFP that also resides in California?</b>			
9.	<b>Did the Bidder provide a current and complete resume for all individuals listed on the organization chart as required in <u>Mandatory Minimum Requirements for Bidders, items 6</u> (see <u>Attachment 15-Copy of Resumes For All Organizational Chart Personnel</u>)?</b>			
10.	<b>Did the Bidder submit the completed <u>Section 4.0 RFP Attachments– Required Attachments Checklist</u> (see <u>Attachment 1-Required Attachment Check List</u>) and include all required attachments?</b>			
11.	<b>Did the Bidder submit all necessary information and forms required showing proof of the mandatory 3% DVBE participation per <u>Section 13-DISABLED VETERAN BUSINESS ENTERPRISE</u> of this RFP? The DVBE must perform a commercially useful function as defined in Chapter 623, Statutes of 2003 (A.B. 669), see <u>Attachment 9-COMMERCIALLY USEFUL FUNCTION CERTIFICATION</u>. Also, see <u>Attachment 16 BIDDER DECLARATION</u> and <u>Attachment 17-DVBE DECLARATIONS (STD. 843)</u>.</b>			
12.	<b>Did bidder provide a reference for each of the three examples listed under <u>Attachment 8 -Technical Proposal, A. Firm Experience</u>? References must be listed on <u>Attachment 16 References and RESUMES</u> (including all required information and/or documentation).</b>			