

Request for Proposal

Property & Casualty Broker and Risk Management Services For Good Wheels, Inc.

Mach 30, 2018

Good Wheels, Inc.
Ft. Myers, Florida

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NOTICE

REQUEST FOR PROPOSAL

Property & Casualty Broker and Risk Management Services For Good Wheels, Inc.

Good Wheels, Inc. is pleased to invite your firm to submit a response in accordance with the terms and conditions of this Request for Proposal document.

In this RFP the following information is sought from qualified insurance brokers:

- Broker credentials and capabilities;
- Approach to managing a comprehensive and competitive insurance program;
- Proactive strategies for reducing insurance costs; and
- Value-added services to assist with our management of claims

INSTRUCTIONS TO RESPONDENTS

The RFP response **must be** submitted via email to Alan Mandel at amandel@goodwheels.org in accordance with the instructions outlined in this RFP

No responses will be accepted after the stated deadline.

1. Request for Proposal Submission and Acceptance

1.1 RFP Submission

A copy of this RFP will be posted on the Good Wheels, Inc. website for any prospective respondents. Respondents shall prepare responses in compliance with all instruction outlined in the RFP. Respondents must provide a cover letter using the instructions herein (see 4.1), providing the requested information and returning the completed document to Good Wheels, Inc. by the stated deadline.

1.2 Submission to Good Wheels, Inc.

Electronic submittal is required.

1.3 Deadline for Submissions

Response shall be received before 4:00 p.m. on April 20th, 2018. Late responses will NOT be considered.

1.4 Completeness

Partial or incomplete responses will be rejected. The response must contain the signature of a duly authorized officer of the respondent, empowered with the legal authority to bind the respondent.

1.5 Rejection of Proposals

Good Wheels, Inc. reserves the right to reject any or all responses to this RFP and to waive any irregularities, technicalities, or omissions therein. Good Wheels, Inc. also reserves the right to reject any proposal it deems not in the best interest of Good Wheels, Inc.

1.6 Additional Requirements

It is anticipated that the selected respondents finalists will be asked to make oral presentations to Good Wheels, Inc. in person at its corporate office in Ft. Myers, Florida.

1.7 Communication with Good Wheels, Inc.

If additional information is required by the respondent for the purpose of interpretation of items in this RFP, respondent shall submit questions by e-mail to Alan Mandel at amandel@goodwheels.org

1.8 Response Cost

All cost incurred in preparing the response to this RFP shall be the sole responsibility of the respondent. All materials and documents submitted by respondents in response to this RFP become the property of Good Wheels, Inc. and shall not be returned to the respondents.

1.9 RFP Timeline

March 30, 2018 – Release of Request for Proposal

April 20, 2018 – Proposals Due to Good Wheels, Inc.

TBD date in May – Broker Selection

1.10 Right to Not Award or Issue Partial Award

Good Wheels, Inc. reserves the right to reject any and all proposals, reject portions of any proposal, and accept the response deemed most advantageous to Good Wheels, Inc.

1.11 Summary of Insurance Coverages

Current property and casualty insurance coverages, including, but not limited to, property, casualty, auto, umbrella, garage keepers, workers' comp, etc.

2. General Conditions

2.1 Overview

Good Wheels, Inc. intends to contract with a vendor to provide Broker and Risk Management Service and required coverage for the Good Wheels, Inc. Insurance Program as outlined in this RFP. The terms "Respondent", "Vendor", "Company", "Firm", "Bidder" and "Contractor" are used interchangeably throughout this document.

2.2 Cancellation

Should the vendor fail to meet the requirements of the Contract after it is executed, Good Wheels, Inc. may cancel the Contract at once and award the remainder of the contract term to the next qualified vendor. If the Contract is cancelled, all material provided to Contractor shall be returned to Good Wheels, Inc.

2.3 Anticipated Commencement Date

Good Wheels, Inc. anticipates the commencement date for Broker Service to begin no later than mid May 2018 and all applicable coverage bound by midnight June 1, 2018.

2.4 Term of Contract

The initial term of the Contract for Broker and Risk Management Service will be for a period of three (3) years commencing on the start date of the Contract. Good Wheels, Inc. reserves the right to modify the length of the term at its discretion.

2.5 Termination of Contract

Good Wheels, Inc. may, at any time upon thirty (30) days written notice to Broker specifying the effective date of termination, terminate the Contract, in whole or in part, when Good Wheels, Inc. deems it to be in its best interest. If Good Wheels, Inc. terminates the Contract, Good Wheels, Inc. shall be liable under the payment provision of the Contract only for payment for services rendered and expenses incurred before the effective date of the termination.

Broker may terminate the Contract upon thirty (30) days written notice to Good Wheels, Inc. if Good Wheels, Inc. is in material breach of the Contract and fails to cure the breach before the end of the thirty (30) day period. If the Contract is terminated prior to Broker's completion of the services to be performed hereunder, then all finished and unfinished documents or other materials prepared or obtained by Broker pursuant to the Contract shall become the property of Good Wheels, Inc. If the Contract is terminated prior to Broker's completion of the services to be performed, Broker shall return to Good Wheels, Inc. any sums paid in advance Good Wheels, Inc. for services that would otherwise have had to be rendered between the effective date of the termination and the original ending date of the Contract.

3. Scope of Services/ Specifications

3.1 Insurance Program Description

Good Wheels, Inc. is seeking proposals for a Broker of Record to provide Broker and Risk Management Services for its property and casualty program. The program has been in force and kept current and has covered the operations of Good Wheels, Inc. including property, automobiles, umbrella, and all other relevant coverages. The purpose and goal of the property and casualty program is to provide protection for Good Wheels, Inc. assets from financial loss due to catastrophes or claims of various types, and to control related expenses. These goals will be met by providing the best Risk Management services and products available within budgetary constraints. This approved program will include brokerage services to assist Good Wheels, Inc. in on-going administration of its current program, to market and place the selected insurance coverages and to oversee and provide advocacy for associated claims. **Proposers are encouraged to offer concepts that will save money and provide superior service while affording maximum protection to Good Wheels, Inc.**

4. Response Structure

To enable Good Wheels, Inc. to evaluate each response in a uniform manner, all respondents shall structure their response in conformance with Section 4 of this RFP, labeling responses to Sections 4.2 to 4.10.

4.1 Cover Letter Referencing this RFP

Respondent must submit a cover letter containing the name and address of the corporation or business submitting the proposal. The cover letter shall contain the title and signature of a duly authorized officer who is empowered with the authority to represent and bind the respondent.

4.2 Company Information

Name

The name under which the respondent is licensed to do business.

Address

The address of the respondent's headquarters office.

Local Address

The address of the respondent's local office, if different from the headquarters address.

Company Officers

Names, titles and telephone numbers of company officers.

Company Contact

Name, title, telephone number and email address of the Company contact for purpose of this RFP.

4.3 References

List two references with contact name and telephone numbers of other Nonprofit or Public Entity customers for which you are currently providing Broker Services that are comparably sized with Good Wheels, Inc.

4.4 Broker Qualifications

Executive Summary

Describe your firm, including size (by industry segment), its history, organization, best practices with level of accountability, and location of offices expected to provide service.

Quality Assurance Program

Provide a sample of the Quality Assurance Program including written service standards for managing the risk of an organization like Good Wheels, Inc.

Key Personnel Qualifications and Prior Experience

Identify the specific team responsible for the Good Wheels, Inc. property and casualty insurance program and the duties they will be responsible for, include names and telephone numbers. Provide background of each team member outlining relevant experience and training.

4.5 Insurance Marketing Services

Market Assessment

Describe your assessment of the current market conditions. List the major insurance companies or re-insurance companies where your firm has placed other nonprofit clients. Describe your access either direct or through a subscriber to these markets. Identify any additional markets and coverage you would consider/recommend for insurance coverage and services for the Good Wheels, Inc.

4.6 Identification of Carriers

Respondent must submit a list of carriers to whom Good Wheels Inc. will be marketed for each line of coverage. For each listed carrier, identify whether access is direct, or through an intermediary.

4.7 Administrative and Claim Services

Administrative Services/Reports

Describe the full range of administrative services your firm would provide to Good Wheels, Inc.

Claim Services/Reports

Describe the various claim management services, protocols, etc. that you would employ for Good Wheels, Inc. Describe the type, benefit and frequency of claim management reports that you would provide to Good Wheels, Inc.

4.8 Safety and Loss Control Services

Describe in detail the full complement of safety and loss control activities, counsel and service that you would recommend. Which of these activities, counsel or services would your firm provide to Good Wheels, Inc. in-house and which ones you would out-source? For each of the areas addressed in the above, please provide examples of each activity and service. Describe your firms' experience with establishing safety programs.

4.9 Additional Services

List any products or services from outside sources that you make available to your clients at a discount.

4.10 Fees

Describe your proposed form of compensation (i.e., commission, annual retainer, and fee-for-service) for any and all services identified in your proposal. If you are proposing a fee, please include your fee schedule.

5. Selection Process

5.1 Solicitation

Responses are solicited from all companies that wish to be considered for the services outlined in the Request for Proposal document. Good Wheels, Inc. will make the selection from the information contained in the responses to the Request for Proposals submitted by the due date, and additional information, if needed from interviews with the short-listed firms. All parties are encouraged to respond in depth with statements containing specific experience and qualifications related to this request in the format described herein.

5.2 Evaluation Criteria

The following criteria, although not exclusive, shall be used in the evaluation. Good Wheels, Inc. reserves the right to change or modify the criteria.

- A. Response to Request for Technical Qualifications
- B. Firm and Service Office Qualifications
- C. Key Personnel Qualifications and Prior Experience
- D. Insurance Marketing Service
- E. Administrative Services
- F. Safety and Loss Control Services Qualifications, Experience and Services
- G. Ability to provide low cost, high quality service
- H. Agreement to terms and conditions of contract as defined/and accepted by Good Wheels, Inc.
- I. References' responses

5.3 Final Selection

Selection Interviews: *(Optional at the sole discretion of Good Wheels, Inc.)*

- A. The purpose of the interviews is to meet your proposed project team, become familiar with key personnel, and understand the project approach and ability to meet the stated objectives for this RFP.

The final selection of the Broker of Record pursuant to the RFP guidelines will be communicated by Alan Mandel from Good Wheels, Inc. directly to the selected Broker.