

Request for Qualifications

The City of Waveland, MS

For

Comprehensive

Insurance Brokerage Services

Issue Date:

July 5, 2023

LEGAL NOTICE REQUEST FOR QUALIFICATIONS

The City of Waveland is requesting sealed submittals for Insurance Brokerage Services. The Insurance Broker(s) selected will provide professional insurance services for the following:

- Property and casualty
- Worker's Compensation
- Officers and Directors' Liability
- Equipment
- Employment Practices Liability
- General Liability
- Automobile/Motor Vehicle Fleet
- Crime
- Cyber Liability

Submittals will be received at Waveland City Hall, 301 Coleman Avenue, Waveland, Mississippi 39576 until Friday, July 28, 2023, at 3:00 p.m. Central Time, at which time they thereafter be opened and acknowledged in a public meeting of the Mayor and Board of Aldermen.

In order to be considered, **submittals must be sealed**, and have clearly written on the face of the envelope the following: **"SEALED QUALIFICATIONS ENCLOSED FOR INSURANCE BROKERAGE SERVICES."** Six (6) copies of each submittal must be included in each sealed envelope.

Submittal requirements and proposal information are available from the City of Waveland through the City Secretary's Office at City Hall, Lisa Planchard, 301 Coleman Avenue, Waveland, Mississippi 39576.

All submissions are required to comply with all applicable local, state, and federal laws and regulations.

The City of Waveland reserves the right to review and evaluate all submittals and the right to reject any submittal which does not comply with the instructions in this request. The City of Waveland reserves the right to waive any and all formality in the best interest of the City.

City of Waveland, Mississippi



Mayor

Advertise: Thursday, July 13, 2023 and Thursday, July 20, 2023

Open Submittals: Tuesday, August 1, 2023

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INTRODUCTION

The City of Waveland ("Waveland") is requesting statements of qualifications for insurance brokerage and consulting services. The objective of this RFQ is to obtain the services of a broker or brokerage firm to assist Waveland in implementing the most comprehensive and cost-effective insurance program for the city. Waveland is seeking a qualified broker with the experience and expertise necessary to procure, maintain, and service Waveland's insurance program. The contract will be for a three (3) year period.

SCOPE OF SERVICES

The primary service to be rendered by the selected broker is to assist Waveland in procuring, maintaining, and servicing comprehensive coverage for all of Waveland's insurable interests, including but not limited to Property, Worker's Compensation, Equipment Floater, Equipment Breakdown, Officer and Director Liability, Legal Liability, Automobile, Employment Practices Liability, Cyber Liability, and Crime insurance coverages from qualified carriers at competitive levels of premium; and with providing risk of loss preparation and analysis. Waveland reserves the right to award the Property Program and Casualty Program based purely upon qualifications and services offered.

To accomplish this task the broker will be expected to:

Work with and be responsive to Waveland and its administration to develop and implement a strategy to generate and maintain competitive interest in Waveland insurance coverages from the available markets;

Solicit and provide Waveland with competitive coverage options and alternatives from qualified carriers that can underwrite to the overall agreed-upon specifications for coverage;

Serve as liaison between Waveland and the selected insurance carriers, keeping Waveland fully apprised of any and all matters that materially impact the coverages;

Advise and consult with Waveland on any actual or proposed risk management issues that could impact insurance coverages, their cost and/or marketing thereof, including but not limited to property risk, loss prevention, and property claims advocacy services;

INSTRUCTIONS

Statement of Qualifications submittals will be received at Waveland City Hall, 301 Coleman Avenue, Waveland, Mississippi 39576 until 3:00 p.m. Central Time on Friday, July 28, 2023

Submittals must be sealed, and have clearly written on the face of the envelope the following:
“SEALED QUALIFICATIONS ENCLOSED FOR INSURANCE BROKERAGE SERVICES.”

Six (6) copies shall be delivered to:

The City of Waveland
ATTN: Lisa Planchard, City Secretary
301 Coleman Avenue
Waveland, MS 39576

The City Secretary for the City of Waveland is the primary contact for this RFQ. All communications regarding this RFQ process should be referred to the City Secretary in writing, either by email (lplanchard@waveland-ms.gov) or by regular U.S. mail. With the exception of the actual submittal, it is requested that email be used in submitting questions, responding to information requests, and all other related communication in order to expedite responses.

A broker may withdraw a submittal by sending a written request to Waveland for its withdrawal signed by the broker. Waveland shall not accept any amendments, revisions, or alterations to submittals after the due date unless formally requested by Waveland.

All documentation submitted in response to this RFQ and any subsequent requests for information pertaining to this RFQ shall become the property of Waveland and will not be returned to the broker.

All costs incurred by the broker in preparing and delivering their submittal, making on-site presentations, and any subsequent time and travel to meet with Waveland regarding the proposal shall be borne by the broker.

RFQ QUESTIONNAIRE

In preparing your written response to any RFQ questions, repeat each question or requirement followed by your response. Please provide complete answers and explain all issues in a concise, direct manner.

WAVELAND will use the information contained in your submittal to determine whether you will be selected for consideration for an award of the services solicited herein.

It is the broker's sole responsibility to submit information relative to the evaluation of its submittal and WAVELAND is under no obligation to solicit such information if it is not included with the broker's submittal. Failure of the broker to submit such information in a manner that is easily located and understood may have an adverse impact on the evaluation of the broker's submittal.

FAILURE TO PROVIDE ALL OF THE REQUESTED INFORMATION HEREIN MAY RESULT IN DISQUALIFICATION OF YOUR SUBMITTAL.

1. State your understanding of the scope of work required by WAVELAND as presented in this RFQ.
2. Describe your claims advocacy and claims consulting services and how such services will be deployed in the event of a large loss or large natural catastrophe. Describe how your claims personnel interface with your day-to-day service team as well as with the insurers and FEMA, MEMA on a pre-loss and post-loss basis in order to expedite the claims (FEMA, MEMA, and Insurance) recovery process and maximize potential claim recoveries.
3. Provide your loss prevention resources and how they will be deployed to prevent claims. Describe how your loss control personnel and services interface with your day-to-day service team as well as with the insurers.
4. State the full name and home office address of your organization. Describe your organizational structure (e.g., publicly held corporation, private non-profit, partnership, etc.). If it is incorporated, include the state in which it is incorporated. Indicate your company's average number of employees for the calendar year 2023.
5. List the name and occupation of those individuals serving on your organization's board of directors and list the name of any entity or person owning 10% or more of your organization.
6. List the name, title, mailing address, telephone number, and email address of the proposer's contact person for this RFQ response.
7. How old is your organization and how long has it been providing services to organizations of the size and scope of WAVELAND?

8. List the office that will service this account. Provide the complete address, phone number, primary contact person, and email address for that person, along with the general functions of the office and the number of full-time employees.

9. Provide a brief resume for each professional staff person that will be assigned to render services to WAVELAND, including detailed information on professional designations and years of related experience, as well as any special training or qualifications. Identify the individual who will serve as the primary contact for the account.

10. REFERENCES – MUNICIPAL If possible, list three municipal property and casualty insurance clients for whom your agency is providing (or has provided) “services” similar to those requested in this RFQ. For each client, specify the type of work performed by your firm, the size of the client, and the period of time retained as a client. For each reference, list the name, title, address, phone number, and email address of a contact person.

11. REFERENCES - GOVERNMENTAL If possible, list three governmental property and casualty insurance clients for whom your agency is providing (or has provided) “services” similar to those requested in this RFQ. For each client, specify the type of work performed by your firm, the size of the client, and the period of time retained as a client. For each reference, list the name, title, address, phone number, and email address of a contact person.

12. REFERENCES - PRIVATE SECTOR List three private sector property insurance clients for whom your agency is providing (or has provided) “services” similar to those requested in this RFQ. For each client, the list must specify the type of work performed by your firm, the size of the client, and the period of time retained as a client. For each reference, list the name, title, address, phone number, and email address of a contact person.

13. Has your firm ever been involved in a lawsuit involving any area covered by this RFQ? If yes, provide details including dates and outcomes.

14. During the past five (5) years has your firm, related entities, principals or officers ever been a party in any material civil or criminal litigation whether directly related to this RFQ or not? If so, provide details including dates and outcomes.

15. State if you currently provide any services, directly or indirectly, to WAVELAND or any of its Divisions or Consultants. If your firm currently provides services to any of the above provide a full description of the services provided.

16. Broker must be appropriately licensed in the state of Mississippi and/or have the legal authority to render the proposed services. Provide a copy of the pertinent license, certificate of appointment, or other such documentation to demonstrate qualifications.

SUBMITTAL EVALUATION

Brokers whose RFQ responses are received by the deadline and meet the requirements will be evaluated further. The following areas of consideration will be used in the RFQ evaluation:

A. Experience and Qualifications - the extent, degree, and context of the broker's previous experience in providing such "services" for programs of similar size and/or complexity as a municipality located on the Mississippi Gulf Coast.

B. Questionnaire Responsiveness - the quality and completeness of responses to the questionnaire and other information requests in this RFQ, including compliance with any subsequent information requests.

C. References - will be contacted at WAVELAND's discretion in order to verify an acceptable level of performance, customer satisfaction, and a track record of providing "services" for programs of similar size and/or complexity as Waveland's insurance program.

D. Selected broker(s) may be invited to make an on-site presentation to WAVELAND.