



Pelham
A path apart.

CITY OF PELHAM

Request for Qualifications (RFQ)

FY2022 - FY2025 Procurement and Placement of Insurance Brokerage Services

It is the intent of the City of Pelham to select an insurance broker to provide insurance placement and value-added risk management services to the City of Pelham for fiscal years 2023 through 2025 (10/1/2022 - 9/30/2025). The City is looking for a partner who wants to engage with city leaders to create loss-reduction and prevention strategies. Selection will be through a review of qualifications based on each responding brokerage's ability to assist in several items in addition to its ability to competitively provide the coverages and services listed in this RFQ. Finalists will interview before a selection panel during the month of July 2022. Proposals must be submitted by close of business on Friday, July 1 at 4:00 p.m. (CDT). Brokers should submit (2) hard copies of their proposal as well as an electronic copy, which may be saved to a storage device or emailed to tom@pelhamalabama.gov. Hard copies should be mailed or delivered to the following address:

City of Pelham, ATTN: Tom Seale, City Clerk/Treasurer
Post Office Box 1419, 401 Southgate Drive, Pelham, Alabama 35124

Brokers should provide their proposed annual service fee for each of the three years of the agreement which should be listed as a comprehensive fee but may also provide a breakdown for each service proposed to the City (insurance placement service, loss control service, etc.). Brokers are expected to provide services based on a fee absent commissions. The broker should also provide relevant experience and provide a list of qualifications for providing brokerage for the listed lines of coverage. Services to be included are certificate of insurance production, procurement of notary and public official's bonds, and contract review. Brokers are encouraged to list any other value-added services or information to demonstrate why their firm is best suited to the needs of the City of Pelham. These value-added services may include, but are not limited to, provision of property valuation assistance, loss control services, claims assistance through shared software platforms and/or web-based services, and any other risk management services that would bring value to the City in return for the service fee.

Before the candidate firm is selected, it must meet the City's standard vendor qualifications by submitting a W-9 and E-Verify certification. It is preferred all billing is through the brokerage firm rather than the various insurance carriers. Brokers should indicate whether they will be able to perform all billing; in the event the broker will not, it is the candidate broker's responsibility to obtain the vendor information and provide it to the City. Brokers who fail or who propose carriers who fail to meet the vendor qualifications will not be selected.

The City of Pelham, Alabama Current Limits of Coverage Applicable to this RFQ

Line of Coverage	Carrier
Deluxe Property	Travelers Property Casualty Company
Crime	Travelers Property Casualty Company
Inland Marine	Travelers Property Casualty Company
General Liability	The Charter Oak Fire Ins. Company
Employee Benefit Liability	The Charter Oak Fire Ins. Company
Law Enforcement Liability	The Charter Oak Fire Ins. Company
Public Entity Management Liability	The Charter Oak Fire Ins. Company
Public Entity Employment-Related Practices Liability	The Charter Oak Fire Ins. Company
Auto Liability	The Phoenix Insurance Company
Auto Physical Damage	The Phoenix Insurance Company
Cyber	Travelers Property Casualty Company
Umbrella Liability	Travelers Property Casualty Company
Ballantrae Golf Club	Travelers Property Casualty Company
Ballantrae Golf Club – Umbrella Liability	Travelers Property Casualty Company

DEMOGRAPHICS

City of Pelham - Departments

1. Police Department
2. Fire Department
3. Public Library
4. Administration: Office of Mayor, City Manager, Finance, Branding and Communications
5. Parks & Recreation
6. Economic Development
7. Streets and Public Works
8. Building & Zoning
9. Engineering
10. Information Technology
11. Municipal Court
12. Water
13. Sewer
14. Human Resources
15. Pelham Civic Complex & Ice Arena (managed by third party)
16. Pelham Racquet Club
17. Ballantrae Golf Club

Fiscal Year 2022 Budget: \$83,984,585

Fulltime Employees: 289

Parttime Employees: 110

Population: 23,707 (2020)

Form of Government: Mayor/Council with a City Manager

Legal Counsel

Ellis, Head, Owens, Justice & Arnold
Post Office Box 587
Columbiana, AL 35051
Office: 205.669.6783

Auditors

BMSS Advisors & CPAs
1121 Riverchase Office Road
Birmingham, AL 35244
Office:

EVALUATION CRITERIA

Proposing firms should supply sufficient information to address the criteria listed below.

Provider Basic Qualifications

1. Name of firm, name of parent company, years in business, years of relevant business experience.
2. Location of proposing team's office, employees at that office, number of servicing offices, regions, departments, affiliates, etc.
3. List of all personnel (note if not full-time) who would be involved in the City of Pelham account. Include name, job title, full business contact information, responsibilities, insurance experience and credentials. Clearly note who would be the point-of-contact for the following: billing, bonds, certificates, proof of insurance and notice of claim.
4. Financial ratings of firm, disclosure or statement regarding history of defaults, contract terminations, and bankruptcies.
5. Alabama Department of Insurance License Number.
6. Responsiveness to City of Pelham vendor requirements.
7. References: at least three, experience with municipalities/government agencies required.
8. Whether firm will perform all billing or whether carriers/third parties will also bill.
9. Organization and/or account structure.
10. Sample Agreement.

Insurance and Service Quotations

Upon selection of the successful broker, the City shall immediately begin working with the broker to place coverage for each line of business included below. The successful broker shall include the carrier's name and financial ratings, coverage amount, limits, and net premium (less any broker commissions or retainage) and aggregates if applicable for 10/25/2022 to 10/25/2023.

It is the City's intention to renew its policies annually with an annual renewal date of October 25th.

1. Public Entity Liability
2. Public Entity Management Practices
3. Crime
4. Property
5. Cyber
6. Inland Marine (property coverage for losses to high value vehicles and equipment)
7. Bonds, certificates/proof of insurance, and contract review to be included at no additional charge
8. Umbrella
9. Exceptions to RFQ must be noted
10. Additional products and/or services to be included, indicate fees if any
11. Broker's fee to be listed separately from premium and confirmed for each of the three years applicable for the term of this agreement

Additional Information

Responding firms are invited to submit additional information which they feel will be helpful in differentiating themselves from other firms, particularly considering they may offer the same types of services. Listed below are suggestions for additional information, but responses are not limited to these items. If the responding firm is chosen as a finalist, the list below are items the City expects the respondent to be prepared to discuss at the selection panel review.

1. Describe differentiating qualities of your firm.
2. Percentages of commercial (and/or governmental and non-profit) vs. residential coverage.
3. Preferred carriers.
4. Sample management reports that will be provided to the City.
5. Samples, websites, or visuals of communications, risk management reviews and recommendations, claims management, etc. services that will be available to the City and demonstrate how those resources have been utilized to help reduce risk for current and former clients.

THE REQUEST FOR INSURANCE BROKERAGE SERVICES IS NOT A REQUEST TO QUOTE INSURANCE COVERAGES OR PREMIUMS

*The City of Pelham reserves the right to waive technicalities or other items associated with this selection process in the best interest of public resources or the business interests of the City. Furthermore, while the brokerage fee is one of the evaluating criteria, it is only one such point of review for the City in determining the ultimate successful provider.

Thank you for your interest in providing brokerage services for the City of Pelham. If you have any questions regarding this RFQ, you may contact Tom Seale, City Clerk/Treasurer at tom@pelhamalabama.gov or telephone 205.620.6404.

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