

ISSUING DEPARTMENT INPUT DOCUMENT

CONTRACT/PROJECT MEASURE ANALYSIS AND RECOMMENDATION

New
 OTR
 Sole Source
 Bid Waiver
 Emergency
 Previous Contract/Project No. RFP 815

Contract
 Re-Bid
 Other – Access of Other Entity Contract
 LIVING WAGE APPLIES: YES NO

Requisition No./Project No.: RFP-01827
 TERM OF CONTRACT 5 YEAR(S) WITH 0 YEAR(S) OTR

Requisition /Project Title: Broker Services for Water & Sewer Department Property Insurance

Description: The County requires an insurance broker to provide brokerage and related services for the procurement of the County's Property Insurance Program for Miami Dade Water and Sewer Department (WASD) properties

Issuing Department: RMD
 Contact Person: Odilon Joseph
 Phone: 305-375-3062

Estimate Cost: \$450,000

Funding Source:
 GENERAL
 FEDERAL
 OTHER X

ANALYSIS

Commodity Codes:	95358	95377	95861		95352
Contract/Project History of previous purchases three (3) years Check here <input type="checkbox"/> if this is a new contract/purchase with no previous history.					
	<u>EXISTING</u>	<u>2ND YEAR</u>	<u>3RD YEAR</u>		
Contractor:					
Small Business Enterprise:					
Contract Value:					
Comments:					

Continued on another page (s): YES NO

RECOMMENDATIONS

	Set-Aside	Subcontractor Goal	Bid Preference	Selection Factor
SBE				

Basis of Recommendation:

Signed: 	Date sent to SBD:
	Date returned to SPD:

PROPOSER INFORMATION

Introduction

Miami-Dade County herein referred to as the "County" through the Internal Services Department, Risk Management Division (RMD), is seeking proposals for the selection of an insurance broker to provide brokerage and related services for a Property Insurance Program (the "Program") for Miami Dade Water and Sewer Department (WASD) properties. WASD operates the County's water and wastewater systems. Miami-Dade County maintains more than 8,500 miles of underground water lines, as well as approximately 4,100 miles of sewer lines, serving some 2.3 million residents and thousands of visitors. The current schedule of assets to be insured is valued at \$1,835,627,800.

The selected Broker, after award is issued, will be authorized to go out into the insurance marketplace to assist the County in procuring the insurance program that best suits the County's needs at the most economical price. The selected Broker shall also provide broker services that will assist the County in managing the Program. Required broker services and underwriting information are further defined herein.

The County anticipates awarding a contract for a five (5) year period, with one, five-year option to renew, at the County's sole discretion.

This broker selection process only applies to this Program and does not apply to any other programs purchased by the County.

Background

Miami-Dade County herein referred to as the "County" through the Internal Services Department, Risk Management Division (RMD), is seeking proposals for the selection of an insurance broker to provide brokerage and related services for a Property Insurance Program (the "Program") for Miami Dade Water and Sewer Department (WASD) properties. WASD operates the County's water and wastewater systems. Miami-Dade County maintains more than 8,500 miles of underground water lines, as well as approximately 4,100 miles of sewer lines, serving some 2.3 million residents and thousands of visitors. The current schedule of assets to be insured is valued at \$1,835,627,800.

Minimum Qualification Requirements

1. Provide documentation that demonstrates Proposer's ability to satisfy all of the minimum qualification requirements. Proposers who do not meet the minimum qualification requirements or who fail to provide supporting documentation may be deemed non-responsive. The minimum qualification requirements for this Solicitation are:
 - a. The individual who will be primarily responsible for the account shall be a licensed insurance agent in the State of Florida at the time of the proposal due date.
(Note: This is a continuing requirement throughout contract award and term of the agreement.)
 - b. The selected Broker should have experience in placing property insurance programs more than \$1,000,000,000 in the South Florida Area.

Services to be provided

1. Design specifications and market the Program for coverage when instructed to do so by RMD, including assisting RMD in the completion of all applications, documents and gathering data which may be requested by insurance companies.
2. Perform CAT modeling analysis to assist the County in determining appropriate deductible/self- Insurance levels and insurance limits.

3. Analyze proposals received from various insurance companies and other parties, negotiate changes for the benefit of the County and verify the reasonableness of the price for the coverage provided.
4. Provide the County with a summary of various Program options, including but not limited to: limits, coverages, retention levels, terms, conditions, and payment options.
5. Make recommendations to the County as to the most advantageous Program which provides the highest level of coverage at the best possible price to meet the County's needs and objectives.
6. Provide analysis and recommendations as to the most cost-effective means for addressing the County's property exposures.
7. Suggest alternative risk financing vehicles to reduce the County's cost of risk.
8. Represent the County in all negotiations with insurers, underwriters, and other parties regarding the Program.
9. When instructed to do so by RMD, administer the placement of coverage and provide original binders, policies and endorsements as required in the timetable specified by RMD.
10. Provide extensive review of binders and policies including verification of conformity to specifications. Request any necessary endorsements/changes/revisions that may be required.
11. Prepare an easy-to-read chart of the Program including limits, pricing, and coverages by layer.
12. Provide binders and policies with a table of contents evidencing layers and limits in the Program in an easy-to-follow format.
13. Provide insurance coverage summaries/descriptions as requested by RMD.
14. Assure that insurance policies are placed with reputable and financially responsible insurers, including keeping RMD informed of any changes in rating of the insurers and making recommendations should ratings change during the policy term.
15. Continually evaluate the Program and recommend coverage changes and improvements to provide the highest level of coverage at the least possible cost to the County.
16. Oversee and coordinate all relevant services performed by insurance companies/underwriters or any service agencies arranged for Program related issues and concerns.
17. Perform administrative and clerical services relative to account management, including but not limited to, issuance of certificates of insurance, verification of the accuracy of bills, audits, and all premium adjustments.
18. Submit all premiums/payments to carriers and other parties. All payments/premiums will be made to the selected Broker.
19. Assign an Account Executive to this Program who will be responsible for communication with RMD and who, along with any other team members assigned, must be available daily to RMD for advice and consultation on Program related issues and concerns.

20. Assist the County in maintaining and updating schedules of values and schedules of insurance.
21. Attend meetings related to this Program with RMD staff and other parties, as requested.
22. Review any related insurance company audits for accuracy.
23. Act as a liaison between RMD and the carriers to assist with the resolution of claims.
24. Advise the County, when requested, on coverage application to specific claims.
25. Coordinate with the carriers to maintain accurate claim data on an accident date basis and provide the County with status reports, in the form and frequency agreed upon with the County.
26. Assign a claim adjustment firm to handle claims for all layers of coverage.
27. Promptly file all claims with all applicable insurers.
28. Coordinate meetings with claims adjusters and the County.
29. Attend claims meetings as requested by the County.
30. Assist with prompt settlement of claims with adjusters/underwriters.
31. Consult with the County regarding the proposed counsel the selected Broker plans to use, if necessary, with any claim. (The County reserves the right to approve legal counsel prior to appointment.)
32. Act as a liaison between any loss control professionals and the County relating to this Program.
33. Assist the County in developing the scope of services for specifications for loss control firms.
34. Attend loss control meetings as requested by the RMD.
35. Review all loss control reports and consult with County to ensure that significant recommendations are addressed.
36. Review loss control reports and monitor corrective action as recommended by loss control consultants.
37. Maintain copies of all loss control reports issued by the carrier for the job site(s).
38. Identify locations to be covered by NFIP policies if requested.
39. Request flood zone determinations, if requested.
40. Complete application for coverage with pertinent information including photographs of location to be covered, if requested.
41. Provide NFIP quotation to RMD if requested.
42. Send application for NFIP coverage for issuance of policy, if requested.
43. Submit payment to NFIP carrier. The County will submit all payments directly to the selected Broker.

44. Review all NFIP policies for accuracy.
45. Maintain accurate schedule of locations and limits of NFIP policies.
46. Provide an easy-to-read chart when billing flood renewals. Chart must contain individual locations, limits, and premium for each policy.
47. Furnish continuing advice and counsel to the County.
- 48.
49. Provide other related services as requested by RMD

Evaluation Criteria

Proposals will be evaluated by an Evaluation/Selection Committee which will evaluate and rank proposals on criteria listed below. The Evaluation/Selection Committee will be comprised of appropriate County personnel and members of the community, as deemed necessary, with the appropriate experience and/or knowledge, striving to ensure that the Evaluation/Selection Committee is balanced with regard to both ethnicity and gender. The criteria are itemized with their respective weights for a maximum total of one hundred (100) points per Evaluation/Selection Committee member.

Technical Criteria

	<u>Points</u>
1. Proposer's relevant experience, qualifications, and past Performance	30
2. Relevant experience and qualifications of key personnel, including key personnel of subcontractors, that will be assigned to this project, and experience and qualifications of subcontractors	30
3. Proposer's approach to providing the services requested in this Solicitation	30

Price Criteria

4. Proposer's proposed price	10
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Minimum Qualification Requirements

1. Provide documentation that demonstrates Proposer's ability to satisfy all the minimum qualification requirements. Proposers who do not meet the minimum qualification requirements or who fail to provide supporting documentation may be deemed non-responsive. The minimum qualification requirement for this Solicitation is:

The individual who will be primarily responsible for the account must be a licensed insurance agent in the State of Florida at the time of the proposal due date. Provide a current copy of the "Florida Department of Insurance License for General Lines (Property & Casualty)", for this individual.

Proposer's Experience and Past Performance (Provide information for Retail Broker Only)

2. State the number of years that the Proposer has been in existence, the current number of employees and the primary markets served.

3. Provide a brief history and description of the Proposers brokerage firm, and the office proposed to service this Program. Include the address of the Proposer's home office and the office proposing to service this Program.
4. List the Proposer's specific experience placing:
 - a. property Insurance programs with insured values more than \$1,000,000,000 within the last three years in the South Florida area.
 - b. property insurance for governmental agencies;
 - c. other property insurance in Florida;
 - d. property programs with insured values more than \$1 billion located elsewhere; and
 - e. describe any other experiences related to the work or services described in the Scope of Services (see Section 2.0) and any other information which may be specific to the required services to be provided.

Be specific as to which of the Proposer's offices placed and handles each program, dates of coverage and the individual responsible for the program.

5. Provide a detailed description of at least three (3) comparable contracts (similar in scope of services to those requested herein) which the Proposer has either ongoing or completed within the past three years. The description should identify for each contract:
 - (i) the client,
 - (ii) description of program,
 - (iii) total dollar value of the contract,
 - (iv) contract duration,
 - (v) client contact person and phone number for reference,
 - (vi) statement or notation of whether Proposer is/was the prime contractor or subcontractor or subconsultant, and
 - (vii) the results of the project.

Where possible, list and describe those projects performed for government clients or similar size private entities and any work performed for the County.

6. List all contracts which the Proposer has performed for Miami-Dade County. The County will review all contracts the Proposer has performed for the County in accordance with County Ordinance No. 98-42, which requires that "a Bidder's or Proposer's past performance on County Contracts be considered in the selection of Consultants and Contractors for future County Contracts." As such the Proposer must list and describe all work performed for Miami-Dade County and include the name of the County Department which administers or administered the contract(s); the contact person(s) on the contract(s) and their telephone number; the dates covering the term of the contract(s) and the dollar value of the contract(s). The description should identify for each contract:
 - (i) The name of the County Department which administers or administered the contract,
 - (ii) description of program,
 - (iii) total dollar value of the contract,
 - (iv) contract duration,
 - (v) County contact person and phone number,
 - (vi) statement or notation of whether Proposer is/was the prime contractor or subcontractor or subconsultant, and
 - (vii) the results of the project.

Proposer's Experience and Past Performance

2. Describe the Proposer's past performance and experience and state the number of years that the Proposer has been in existence, the current number of employees, and the primary markets served.
3. Provide a detailed description of comparable contracts (similar in scope of services to those requested herein) which the Proposer has either ongoing or completed within the past three years. The description should identify for each project: (i) client, (ii) description of work, (iii) total dollar value of the contract, (iv) dates covering the term of the contract, (v) client contact person and phone number, (vi) statement of whether Proposer was the prime contractor or subcontractor, and (vii) the results of the project. Where possible, list and describe those projects performed for government clients or similar size private entities (excluding any work performed for the County).
4. List all contracts which the Proposer has performed for Miami-Dade County. The County will review all contracts the Proposer has performed for the County in accordance with Section 2-8.1(g) of the Miami-Dade County Code, which requires that "a Bidder's or Proposer's past performance on County Contracts be considered in the selection of Consultants and Contractors for future County Contracts." As such the Proposer must list and describe all work performed for Miami-Dade County and include for each project: (i) name of the County Department which administers or administered the contract, (ii) description of work, (iii) total dollar value of the contract, (iv) dates covering the term of the contract, (v) County contact person and phone number, (vi) statement of whether Proposer was the prime contractor or subcontractor, and (vii) the results of the project.

Key Personnel and Subcontractors Performing Services

5. Provide an organization chart showing all key personnel, including their titles, to be assigned to this project. This chart must clearly identify the Proposer's employees and those of the subcontractors or subconsultants and shall include the functions to be performed by the key personnel. All key personnel includes all partners, managers, seniors and other professional staff that will perform work and/or services in this project.
6. List the names and addresses of all first tier subcontractors, and describe the extent of work to be performed by each first tier subcontractor. Describe the experience, qualifications and other vital information, including relevant experience on previous similar projects, of the subcontractors who will be assigned to this project.
7. Describe the experience, qualifications and other vital information, including relevant experience on previous similar projects, of all key personnel, including those of subcontractors, who will be assigned to this project.
8. Provide resumes, if available with job descriptions and other detailed qualification information on all key personnel who will be assigned to this project, including any key personnel of subcontractors.

Note: After proposal submission, but prior to the award of any contract issued as a result of this Solicitation, the Proposer has a continuing obligation to advise the County of any changes, intended or otherwise, to the key personnel identified in its proposal.

Proposed Approach to Providing the Services

9. Describe Proposer's specific project plan and procedures to be used in providing the services in the Scope of Services (see Section 2.0).
10. Describe Proposer's approach to project organization and management, including the responsibilities of Proposer's management and staff personnel that will perform work in this project.

11. Provide a project schedule identifying specific key tasks and duration.
12. Identify if Proposer has taken any exception to the terms of this Solicitation. If so, indicate what alternative is being offered and the cost implications of the exception(s).