

BakerRipley RFP 20-01 Property and Casualty Insurance Broker Service

Attachment A – Vendor Proposal Responses and Qualifications

Company Name:

Contact Name:

Contact Email:

Contact Telephone Number:

Vendor must type responses to the following questions (*handwritten responses are not acceptable*):

1. Company Narrative - State your company's mission, vision, and its overall operation including company structure, office locations, type of services provided, geographic information, years of operation.

Vendor Response:

2. Vendor's Experience - Describe your company's current or past experience in providing the proposed insurance programs for a 501 (c) (3) and government funded organization, skill level, experience, and opportunities for creativity and innovation. Please include a list of services of similar size and scope as the project.

Vendor Response:

3. Describe your company's status, if any MBE/WBE/HUB/SDVOSB. Provide your certification (s) documents; if applicable and/or your company's commitment to actively participating in local and national supplier diversity.

Vendor Response:

4. Describe your Community Involvement; if applicable.

Vendor Response:

5. Describe your company's requirements for criminal background checks, if any, for employees.

Vendor Response:

6. Provide a brief description of your company's accounting system, internal controls, and invoicing.

Vendor Response:

7. Provide the names and resumes for all personnel who will be assigned as our Agency representative.

Vendor Response:

How many employees do you have in the state of Texas?

Vendor Response:

8. If any component/s of your company's service offering is to be outsourced to any third party, please advise which components/s of your service offering will be outsourced together with full details of the party organizations to which it would be outsourced.

Vendor Response:

9. Please provide details of your company's professional Indemnity insurance with particular reference to the name of the insurer/s and the limit/s of indemnity and deductible/s applicable in the terms of the policy.

Vendor Response:

10. Please provide an overview of the procedures and methodologies that your company employs to monitor the solvency of insurers, underwriting agencies and other risk carriers with whom your company transacts business in the USA and elsewhere in the World, if relevant. Please pay particular attention to your procedures in relation to insurers and agencies not rated by rating agencies such as Standards and Poor's.

Vendor Response:

11. Please provide an overview of the systems, procedures and methodologies that your company utilizes to guarantee and monitor the standard and quality of its service offerings. In particular, please provide details of the resources that your company devotes to this task.

Vendor Response:

12. Please provide an outline of the administrative, brokering, placement, technical and claims services which your company considers to be relevant and the manner in which your company proposes to provide those services for Agency.

Vendor Response:

13. Please specify the risk management services, such as risk profiling, retention analysis, gap analysis and other initiatives which your company would recommend to Agency and the rationale behind your recommendations.

Vendor Response:

14. What other services does your company consider to be important and relevant for the effective management and treatment of risks and exposures by Agency and why?

Vendor Response:

15. In your view, what are the key exposures our Agency faces?

Vendor Response:

16. Please indicate whether your company receives, or in the future may receive, contingency commissions (volume bonus and/or profit share) from any insurer/s with whom you may place any of the Agency's Insurances.

Vendor Response:

17. What is your opinion on receiving broker compensation?

Vendor Response:

Are you transparent with commissions or fees that are earned within the policies?

Vendor Response:

18. Do you have any concerns about sharing the commission statements from insurers?

Vendor Response:

19. Does your company have experience working with and following your client's Procurement process with programs similar to Agency? If yes, please explain.

Vendor Response:

20. Describe briefly how your client service team delivers a high level of service? What should Agency expect of your team?

Vendor Response:

21. Describe how your client service team will stay current on the changes to Agency's operations?

Vendor Response:

22. How long has your company provided Insurance Broker Services?

Vendor Response:

23. What is your area(s) of specialization?

Vendor Response:

24. Please describe how you propose the transition into your program structure?

Vendor Response:

25. Tell us about your marketing process.

Vendor Response:

26. Will we have an opportunity to meet with the underwriters?

Vendor Response:

27. How do you evaluate insurers?

Vendor Response:

28. What kind of loss prevention services do you offer? Provide the cost of these services on Attachment B.

Vendor Response:

29. How will your company work with us on loss prevention?

Vendor Response:

30. Describe your company's claim handling capabilities.

Vendor Response:

31. What is the frequency and extent of your company's claims reports?

Vendor Response:

32. Will your company provide an annual activity report?

Vendor Response:

33. If required, can your company provide statistical reports or actuarial services on funding levels?

Vendor Response:

34. Please describe your company's knowledge of the insurance market available for our industry.

Vendor Response:

How many accounts do you currently serve in our industry?

Vendor Response:

How many accounts have you lost in our industry within the last five (5) years?

Vendor Response:

35. Please review and provide comments about our current property and casualty program, see Attachment C – Coverage.

Vendor Response:

Do you have any immediate suggestions for improvement and how to implement?

Vendor Response:

36. Identify key metrics you propose to use to measure your performance in delivering services to Agency. Your response should include how you measure and monitor production quality, ensure delivery/turnaround times are being met, and how problems are tracked, escalated (if required) both internally and with Agency.

Vendor Response:

37. Describe lessons learned with prior or current customers providing similar products or services that were not successful and what steps your company has taken to effectively identify and mitigate from recurring; if any.

Vendor Response:

38. What differentiates you from your competitors?

Vendor Response:

39. List (3) three non BakerRipley references where your firm has provided similar insurance products and scope – within the last (3) three years.

Company #1

Contact Name:		
Company Name:		
Address:		
Telephone Number (s)	Office:	Cell:
Email:		
Brief program description:		
Provide a detailed list of products and services provided:		
Contract Term:	Start Date:	End Date:
Did your company identify and reduce areas of risk which resulted in a reduction in claims and premiums during the contract term? If yes, briefly describe.		

Company #2

Contact Name:		
Company Name:		
Address:		
Telephone Number (s)	Office:	Cell:
Email:		
Brief program description:		
Provide a detailed list of products and services provided:		
Contract Term:	Start Date:	End Date:
Did your company identify and reduce areas of risk which resulted in a reduction in claims and premiums during the contract term? If yes, briefly describe.		

Company #3

Contact Name:		
Company Name:		
Address:		
Telephone Number (s)	Office:	Cell:
Email:		
Brief program description:		
Provide a detailed list of products and services provided:		
Contract Term:	Start Date:	End Date:
Did your company identify and reduce areas of risk which resulted in a reduction in claims and premiums during the contract term? If yes, briefly describe.		

*It is important that you provide references. We will only contact your references if you are a finalist and we will notify you first.