

RESOLUTION NO. 18-07-58

A RESOLUTION OF THE VILLAGE COUNCIL OF ISLAMORADA, VILLAGE OF ISLANDS, FLORIDA, APPROVING THE FINAL RANKINGS AND RECOMMENDATIONS OF THE RFP 18-18 EVALUATION COMMITTEE FOR INSURANCE AND RISK MANAGEMENT SERVICES; AUTHORIZING THE VILLAGE MANAGER AND VILLAGE ATTORNEY TO NEGOTIATE A PROFESSIONAL SERVICE AGREEMENT FOR THE REQUESTED SERVICES; AND PROVIDING FOR AN EFFECTIVE DATE

WHEREAS, Islamorada, Village of Islands (the “Village”) currently purchases liability, auto and property insurance through the Florida Municipal Insurance Trust (“FMIT”); and

WHEREAS, the Village also purchases wind, flood and marine coverage through FMIT and other insurance companies; and

WHEREAS, the Village is in need of a consultant to audit, review and evaluate the Village’s insurance policies in order to properly identify areas of exposure that are uninsured or insufficiently insured and other related insurance administration support services; and

WHEREAS, the Village advertised a Request for Proposal for Insurance and Risk Management Services (“RFP 18-18”) from May 11, 2018 through June 15, 2018 (Exhibit “A”); and

WHEREAS, the Village Manager created an Evaluation Committee (the “Committee”) to review responsive proposals and make a recommendation to the Village Council for the selection of a consulting firm; and

WHEREAS, the Committee reviewed the five (5) proposals received using the selection criteria and point system detailed in the RFP; and

WHEREAS, the Committee has recommended Ben Few & Co., LLC. for selection; and

WHEREAS, the Village Council of the Village desires to approve the rankings and select the recommended firm for grant writing consulting and support services; and

WHEREAS, the Village Council has determined that the procurement and utilization of these services is in the best interest of the Village and its residents.

NOW, THEREFORE, BE IT RESOLVED BY THE VILLAGE COUNCIL OF ISLAMORADA, VILLAGE OF ISLANDS, FLORIDA, AS FOLLOWS:

Section 1. **Recitals.** The above recitals are true and correct and incorporated into this Resolution by this reference.

Section 2. **Approval of Ranking.** The Village Council of Islamorada, Village of Islands, hereby approves the Committee's final rankings and recommendations as follows:

1. Ben Few & Co., LLC.
2. Public Risk Insurance Agency
3. First Florida Insurance Brokers
4. Gehring Group
5. McGriff, Seibels & Williams of Texas, Inc.

Section 3. **Authorization of Village Officials.** The Village Manager and/or his designee and the Village Attorney are authorized to negotiate the terms and conditions of a Professional Services Agreement with Ben Few & Co. LLC., to be subsequently presented to the Village Council for its approval.

Section 4. **Effective Date.** This Resolution shall take effect immediately upon adoption.

Motion to adopt by Vice Mayor Deb Gillis, second by Councilman Mike Forster.

FINAL VOTE AT ADOPTION

VILLAGE COUNCIL OF ISLAMORADA, VILLAGE OF ISLANDS

Mayor Chris Sante	YES
Vice Mayor Deb Gillis	YES
Councilman Mike Forster	YES
Councilwoman Cheryl Meads	ABSENT
Councilman Jim Mooney	YES

PASSED AND ADOPTED ON THIS 19TH DAY OF JULY, 2018.



CHRIS SANTE, MAYOR

ATTEST:



KELLY TOTH, VILLAGE CLERK

APPROVED AS TO FORM AND LEGALITY
FOR THE USE AND BENEFIT OF ISLAMORADA,
VILLAGE OF ISLANDS ONLY



ROGET V. BRYAN, VILLAGE ATTORNEY

**REQUESTS FOR PROPOSALS
FOR
INSURANCE AND RISK MANAGEMENT SERVICES
RFP 18-18**



**Islamorada, Village of Islands
Village Administrative Center, 3rd Floor
86800 Overseas Highway
Islamorada, FL 33036**

May 11, 2018

ISLAMORADA, VILLAGE OF ISLANDS, FLORIDA

REQUEST FOR PROPOSALS

**RFP NUMBER: 18-18
INSURANCE AND RISK MANAGEMENT SERVICES**

Issue Date: May 11, 2018

Due Date: June 15, 2018

To Whom It May Concern:

Pursuant to this Request for Proposals (RFP), Islamorada, Village of Islands ("Village") is currently soliciting proposals from qualified firms to provide **Insurance and Risk Management Services** to the Village's Finance and Administration Department, per specifications and scope of services established from time to time.

The Village utilizes the DemandStar automated system to advertise solicitation information to potential customers, consultants and other types of vendors, as well as the general public. DemandStar may be accessed at www.DemandStar.com. Copies of this solicitation and information can also be received by contacting the Village Clerk at clerk@islamorada.fl.us or to the address shown below and the Village's website at www.islamorada.fl.us.

Interested firms are invited to submit Proposals for consideration in accordance with this RFP to the Village Clerk. Original signed Proposal Documents, an electronic copy in Adobe Acrobat PDF format, and five (5) hard copies of the Proposal Documents must be received prior to **3:00 P.M. Eastern Standard Time (EST) on June 15, 2018** by:

Village Clerk
Islamorada, Village of Islands
Village Administrative Center, 3rd Floor
86800 Overseas Highway
Islamorada, Florida 33036
Telephone: (305) 664-6412
Fax: (305) 664-6466

The Proposal Documents shall be enclosed in a sealed opaque envelope or box and be plainly marked on the upper left-hand corner with the name and address of the Proposer and bear the following title: "Islamorada, Village of Islands, Request for Qualifications Insurance and Risk Management Services RFP 18-18." ***The Village will not accept Proposals received after the specified time and date.***

Proposals will be opened by the Village Clerk on June 15, 2018 at 3:15 p.m. at 86800 Overseas Highway, 3rd Floor, Islamorada, Florida.

All requests for information or clarification regarding this proposal shall be made in writing and submitted to Ana Hernandez, Procurement and Grants Administrator at ana.hernandez@islamorada.fl.us no later than June 1, 2018. ***Inquiries, clarifications or requests for interpretations will not be responded to if received after this date and time.***

PROPOSAL DOCUMENTS SUBMITTAL AND SELECTION

1. All Proposal Documents, consisting of an original signed set, an electronic copy in Adobe Acrobat PDF Format, and five (5) copies, must be received no later than **3:00 PM EST on June 15, 2018 ("Submittal Deadline")**. **Late Proposal Documents will not be considered.**
2. Late Proposal Documents in response to the Request for Proposals (RFP) shall not be accepted after the specified Submittal Deadline and shall be returned unopened to the Proposer.
3. All Proposals shall be directed to:

Village Clerk
Islamorada, Village of Islands
Village Administrative Center, 3rd Floor
86800 Overseas Highway
Islamorada, Florida 33036
4. All costs of preparation of Proposal Documents will be borne by the Proposer.
5. This RFP does not constitute an offer of employment or contract for services.
6. The Village reserves the option to reject any or all Proposal Documents, wholly or in part, received by reason of this RFP, to terminate the procurement process at any time, to waive any irregularities or omissions in any Proposal, to award in whole or in part to one or more Proposers, or to take any other such actions that may be deemed in the best interest of the Village.
7. The Village reserves the option to retain all Proposal Documents, whether selected or rejected.
8. All Proposal Documents will be reviewed and evaluated by the Evaluation Committee and selection will be made by the Village Council. The Evaluation Committee and/or the Village Council may deem it necessary to interview Proposers as part of the evaluation and selection process.

TABLE OF CONTENTS

REQUEST FOR PROPOSALS	ii
PROPOSAL DOCUMENTS SUBMITTAL AND SELECTION	iii
TABLE OF CONTENTS	1
1.0 GENERAL INFORMATION	2
1.1 Defined Terms	2
1.2 Description of the Village	3
1.3 Procurement and Proposal Process	3
1.4 Addenda to RFP	4
1.5 Communications Protocol	4
1.6 Confidentiality and Public Records	5
1.7 Compliance with Federal, State Laws and Village Code	5
1.8 Proposal Submittal Deadline Delivery	5
1.9 Proposer Expenses	6
2.0 THE PROJECT	7
2.1 Project Scope	7
2.3 Project Schedule	8
3. PROPOSAL REQUIREMENTS AND SUBMITTAL	9
3.1 Insurance	10
3.2 Other Supporting Documentation	11
4. PROPOSAL EVALUATION	11
4.1 Evaluation Committee	11
4.2 Evaluation Process	12
4.3 Evaluation Criteria	12
4.4 Village Rights and Options	12

1.0 GENERAL INFORMATION

1.1 DEFINED TERMS

The terms defined in this section shall apply to all documents contained in this RFP, the Proposal Documents to be submitted, and the Contractual Services Agreement for the Project. If a conflict arises, the definitions contained in the Contractual Services Agreement shall supersede the definitions provided in this RFP.

"Addenda" or "Addendum" means a written modification to this RFP issued by the Village covering changes, additions, clarifications, deletions or reductions in the terms of this RFP.

"Appendix" means any of the Appendices included to this RFP.

"Applicable Law" means any applicable law, regulation, ordinance, rule, order, or determination of any federal, state, county, or municipal authority, including the Village Charter and Village Code of Ordinances.

"Contractual Services Agreement" means the contract for Insurance and Risk Management services, to be executed by the Village and the Selected Firm.

"Evaluation Committee" means the committee appointed or selected by the Village Manager, responsible for the review and evaluation of Proposals in response to this RFP and recommendations for selection of a Proposer.

"Firm" means a Proposer or entity responding to this RFP and submitting a Proposal.

"Project" means everything required to be furnished and done for and relating to the professional services in accordance with this RFP and the Contractual Services Agreement and contract documents, including the employment and furnishing of all labor, materials, equipment, supplies, tools, storage, transportation, insurance, bonds, and other in kind services whatsoever necessary for the full performance by the Firm.

"Proposal" means the Proposal submitted by a Proposer in response to and in accordance with this RFP.

"Proposal Documents" means any one of the Proposal documents identified and attached to this RFP, which must be submitted with the Proposal according to the instructions in this RFP.

"Proposer" means the entity or firm that submits a timely responsive Proposal in response to this RFP.

"RFP" means this Request for Qualifications.

"Selected Firm" or "Selected Proposer" means the Firm or Proposer selected to enter into the

Contractual Services Agreement with the Village and awarded the Contractual Services Agreement.

"State" means the State of Florida.

"Village" means Islamorada, Village of Islands.

"Village Council" means the legislative/governing body of Islamorada, Village of Islands.

1.2 DESCRIPTION OF THE VILLAGE

Islamorada, Village of Islands (the "Village") is a municipality located in the upper Florida Keys and is comprised of four (4) islands spanning approximately eighteen (18) miles. The Village was incorporated in 1997, and the current population is approximately 6,300. As a Florida municipality, the Village must operate within the guidelines of Florida Statutes relating to public records, public meeting and Sunshine laws. The Village undergoes an annual financial audit pursuant to Florida Statutes. Additionally, the Village must follow the guidelines of its purchasing ordinance when purchasing capital, supplies and services.

The Village is located within the Florida Keys Area of Critical State Concern. Pursuant to Chapter 380, Section 380.0552 of the Florida Statutes, the "Florida Keys Area Protection Act" was adopted by the Florida legislature to establish a land use management system that protects the natural environment of the Florida Keys, that promotes orderly and balanced growth and that ensures that the population of the Florida Keys can be safely evacuated in the event of a hurricane or other emergency. Comprehensive plans and land development regulations and administration of such plans and regulations must be at a service level considered adequate to protect the Florida Keys Area, must fulfill the legislative intent of the Act and must be consistent with and further the principles guiding development.

The purpose of this RFP is to solicit proposals from qualified firms to provide Insurance and Risk Management Services. The Village intends to identify a firm most likely to successfully represent the Village in its desire to minimize rate increases for all commercial lines of insurance coverage (liability, property, auto, wind, flood) and workers' compensation insurances, analyze current plans and recommend revisions or new plans. Hurricane Irma impacted the Village on September 10, 2017, and as a result of this experience, the Village became aware of areas where insurance coverage, especially property insurance, is inadequate or ineffective.

1.3 PROCUREMENT AND PROPOSAL PROCESS

This RFP seeks the competitive procurement and selection of a qualified Firm to enter into a Contractual Services Agreement with the Village. It is the intent of the Village to competitively solicit and award a Firm which is competent and highly qualified and that understands the needs of the Village.

Firms will be evaluated and ranked for competitive selection and award based on the evaluation criteria set forth in this RFP. Proposal Documents submitted in response to this RFP will be reviewed and evaluated by the Evaluation Committee appointed by the Village Manager. The Evaluation Committee during its evaluation process may contact references and verify information submitted by Proposers during the RFP process. The Evaluation Committee may request clarification and additional information from Proposers.

1.4 ADDENDA TO RFP

During the period provided for preparation of Proposal Documents, the Village may issue Addenda answering questions, clarifying or modifying this RFP. Such Addenda will be numbered consecutively and shall be posted on DemandStar at www.demandstar.com, the Village's website at www.islamorada.fl.us and issued to any Firms in receipt of the RFP package directly from the Village Clerk.

The issuance of a written addendum is the only official method whereby interpretation, clarification or additional information can be given. Only written Addendum from the Village shall be binding. Proposers that obtain information from sources other than addenda issued by the Village or via DemandStar are cautioned that the information may be incomplete. The Proposer shall be responsible for obtaining all Addenda prior to submitting Proposal Documents. Copies of all Addenda shall be enclosed in the proposal packages.

1.5 COMMUNICATIONS PROTOCOL

The Village is committed to a fair and open process for interested parties to receive information about the Project and the competitive selection and award procurement process the Village is utilizing in this RFP. Any and all questions, inquiries, requests for clarification and additional information, and correspondence concerning this RFP or the Project requirements must be directed in writing to:

U.S. Mail: Ana Hernandez
Procurement and Grants Administrator
Islamorada, Village of Islands
Village Administrative Center, 3rd Floor
86800 Overseas Highway
Islamorada, FL 33036

Email: ana.hernandez@islamorada.fl.us
Subject: RFP 18-18

The Procurement and Grants Administrator is the sole point of contact for the Village in this RFP procurement process. All communications between the Proposer and the Village shall be with the Procurement and Grants Administrator and must be submitted in writing and subject to distribution to all Proposers. Communications sent via electronic mail may be printed and made available to all Proposers. Responses to questions or requests for information will be provided to all Proposers. Any and all such interpretations and supplemental information will be made in the form of written Addenda, which will be distributed via DemandStar and posted on the Village's website and will become a part of this RFP.

*Request for Proposals
Insurance and Risk Management Services
RFP 18-18*

1.6 CONFIDENTIALITY AND PUBLIC RECORDS

The Proposal Documents and related materials received from the Firms in response to this RFP will become the property of the Village and will not be returned. The Village is a public agency subject to the Florida Public Records Law.

Upon the Village's notice of a decision or intended decisions on selection of a Proposer or within ten (10) days after the opening of the Proposal Documents, whichever is earlier, any material submitted in response to this RFP will become a "public record" and shall be subject to public disclosure consistent with Chapter 119, Florida Statutes (Florida Public Records Law). All documents submitted to the Village pursuant to this RFP are public records or documents subject to disclosure, except as specifically exempted by Florida law or Applicable Law. The Village reserves the right to make all final determination(s) of the applicability of the Florida Public Records Law.

By submitting their Proposals, each Firm expressly acknowledges and agrees that the Village will not be responsible or liable in any way for any losses that the Firm may suffer from disclosure of information or materials to third parties and the Firm agrees to defend, indemnify, and hold harmless the Village from all costs (including reasonable attorneys' fees) arising from or related to any action under Florida Public Record's Law.

1.7 COMPLIANCE WITH FEDERAL, STATE LAWS AND VILLAGE CODE

The Project may be subject to the regulatory authority of a number of local, State and Federal agencies. The Selected Firm shall be responsible for obtaining all necessary permits and licenses.

In addition, the Proposal for this Project must fully meet the legal requirements of:

- The Village Charter, Code of Ordinances and Comprehensive Plan; and
- State and federal laws and statutes applicable to the Contractual Services Agreement.

No proposal shall be accepted from, nor will any contract be awarded to, any person who is in arrears to the Village for any debt or contract, who is a defaulter, as surety or otherwise, of any obligation to the Village, or who is deemed irresponsible or unreliable by the Village. The Village will be the sole judge of said determination.

1.8 PROPOSAL SUBMITTAL DEADLINE DELIVERY

Submission of responsive Proposal Documents is required for the Proposer to affirmatively declare its intention to participate in the RFP and Proposal process. Submittals shall comply with the instructions in this RFP.

By signing and submitting Proposal Documents, the Firm certifies that no principal (which includes shareholders, members, partners, officers, directors, or executives) is presently debarred, proposed for debarment or declared ineligible to bid or participate in any federal, state or local government agency projects.

A Firm may submit modified Proposal Documents to replace all or any portion of previously submitted Proposal Documents up to the Submittal Deadline. Only the latest version of the Proposal Documents will be considered.

If any information provided by a Firm becomes inaccurate, the Firm must immediately notify the Village and provide updated accurate information in writing, under penalty of perjury.

All Proposal Documents, consisting of one (1) original signed set, five (5) printed copies, and one (1) electronic copy on CD or flash drive must be received no later than **3:00 PM EST on June 15, 2018 ("Submittal Deadline")**.

The electronic copy shall be exactly identical to what is contained in the original hardcopy Proposal. The CD or flash drive shall contain a single .PDF file including all attachments in a format that enables word searches to the maximum extent possible. Forms and/or documents requiring signatures may be scanned but must be merged into the Proposal .PDF file.

The Proposal Documents (CD or flash drive and hard copies) must be submitted in a sealed envelope or box and plainly marked on the upper left hand corner with the name and address of the Firm and bear the following title: **"Islamorada, Village of Islands, Request for Qualifications Affordable Housing Compliance Monitoring, Consulting and Support Services RFP 18-16."** and shall be delivered to:

Village Clerk
Islamorada, Village of Islands
Village Administrative Center, 3rd Floor
86800 Overseas Highway
Islamorada, Florida 33036

Late Proposal Documents will not be accepted after the Submittal Deadline. All Proposal Documents submitted after the Submittal Deadline will not be accepted and will be rejected and returned to the Proposer unopened. An amendment is considered a new Proposal and will not be accepted after the Submittal Deadline. The delivery of Proposal Documents to the Village by the Submittal Deadline is solely the responsibility of the Proposer.

A Proposer may withdraw submitted Proposal Documents prior to the Submission Deadline by delivering a written withdrawal request to the address above. Such withdrawal will not prejudice the Village against the Firm in regard to future opportunities to work with the Village.

1.9 PROPOSER EXPENSES

The Village accepts no liability for the costs and expenses incurred by the Proposers in responding to this RFP, attending Pre-Proposal meetings, site visits or interviews, due diligence and inquiries, subsequent negotiations, and all other activities associated with this procurement process, which shall be the sole responsibility of the Proposers. Proposers shall prepare the required Proposal Documents at their sole cost and expense with the understanding that the Village shall not provide reimbursement for the associated costs and expenses.

*Request for Proposals
Insurance and Risk Management Services
RFP 18-18*

2.0 THE PROJECT

The Village seeks a firm that is highly skilled and fully knowledgeable about commercial lines of insurance coverage, including liability, property, automobile, wind and flood insurance, and workers' compensation coverage for municipalities within the State of Florida. The contract will be awarded to the responsive and responsible firm that provides the most advantageous proposal based on the scope of services, evaluation criteria, references and fees. Although price is a consideration, it will not be the sole determinant for awarding this contract. No minimum quantity of work or compensation for the work will be assured to the firm retained. The Village will award only a single contract.

The Village currently purchases liability, auto and property insurance through the Florida Municipal Insurance Trust ("FMIT"). Additional policies for wind, flood and marine coverages are secured through FMIT or through other insurance companies, including Citizens, Frontline and Safepoint. Insurance premiums for these commercial coverages and workers' compensation coverage in FY 2017-2018 total approximately \$800,000.00. The Village has approximately 110 full-time and 10 part-time employees.

2.1 PROJECT SCOPE

The intent of this RFP is for the Village to enter into an agreement with an insurance and risk management services consultant that will assist the Village in the following areas:

- Audit, review and evaluate all of the Village's existing insurance policies to ensure that they are meeting the best interests of the Village and that there are no areas of exposure that are uninsured or insufficiently insured.
- Review workers' compensation injuries and loss reports and make recommendations to control losses.
- Recommend proper limits, deductibles and coverage levels common to local governments and specific to the Village. Performance of an asset inventory and identification of appropriate coverage levels by asset may be necessary.
- Solicit proposals from qualified insurance carriers for new or additional insurance coverages who are experienced in and familiar with working with Florida local governments.
- Evaluate proposals and assist the Village in negotiations and implementation of policies and coverages.
- Attend meetings with Village staff, insurance carriers and related service companies to discuss insurance policy terms, benefits, service issues, manage costs and improve communications.
- Provide general information, updates, document preparation/review and assistance with filings of required documents, when needed.
- Research governmental regulations, both state and federal, influencing appropriate coverage types and levels, especially as they relate to maximizing reimbursement by the Federal Emergency Management Administration ("FEMA") in the event of a natural disaster.

*Request for Proposals
Insurance and Risk Management Services
RFP 18-18*

- Assist the Village Finance Department with budgeting for annual renewals.
- Respond to questions from and provide information to staff and provide other requested insurance administration support services throughout the course of the plan year.
- Evaluate Village programs and identify instances where the Village should be requesting certificates of insurance from third parties utilizing Village facilities and properties and provide guidance to staff, including review of certificates of insurance provided by vendors and suppliers to the Village, analysis of risk transfer options, such as, indemnity agreement.
- Interface and communicate with insurance carriers as needed to assist the Village in the resolution of problems.
- Assist the Finance and Administration Department in ascertaining replacement cost value for Village property and assets.

2.3 PROJECT SCHEDULE

The following Project Schedule is **tentative** and subject to change by the Village, in its sole discretion, at any time during the procurement process.

Schedule	Date
Issue RFP	May 11, 2018
Deadline for Questions from Proposers Regarding RFP	June 1, 2018
Deadline for Issuance of RFP Addenda (if necessary)	June 8, 2018
Deadline for Submittal of Proposals	June 15, 2018 3:00 PM
Opening of Proposals	June 15, 2018 3:15 PM
Responsiveness ranking and recommendations by Evaluation Committee	By June 30, 2018
Presentation of Committee recommendation to Village Council	By July 31, 2018
Approval and Selection of Proposal by Village Council	By July 31, 2018
Contractual Services Agreement Execution	By August 15, 2018
Notice to Proceed to Firm	By August 31, 2018

Once the Firm is selected by the Village Council, the Village Manager and Village Attorney will enter into negotiations with the Firm to provide the contractual services.

3. PROPOSAL REQUIREMENTS AND SUBMITTAL

The Firm's Proposal shall be typed and submitted on 8 1/2"x11" paper, portrait orientation, with headings and sections numbered appropriately. The following should be submitted for a proposing firm to be considered:

- An original copy (so marked) and five (5) copies and one (1) CD or flash drive, sealed in one package and clearly labeled **"Islamorada, Village of Islands, Request for Proposals – Insurance and Risk Management Services RFP 18-18."**
- Title Page showing the RFP number, subject, the firm's name, the contact person's name, address and telephone number and the date of the proposal.
- Transmittal Letter summarizing in a brief and concise manner the Proposer's understanding of the work to be performed, the commitment to perform the work within the anticipated time period, a statement why the firm believes itself to be best qualified to perform the engagement, and a statement that the proposal remains in effect for ninety (90) days. An authorized agent of the Proposer must sign the Letter of Transmittal indicating the agent's title or authority.
- Company Overview: Provide an overview of the company detailing the total number and expertise of professional staff, describing staff credentials, and identifying office locations and staff assigned to those offices throughout the Florida Keys or the nearest locations to the Florida Keys. **Please note that the Village prefers to contract directly with prime entities and the use of sub-consultants in your submission may affect the proposal scoring.**
- Experience and qualifications of the firm with the name, address, phone number, fax number and email address of the business and whether it operates as an individual, partnership, or corporation. Also indicate if the Firm is a female or minority owned and/or operated business. If so, attach a certificate or other proof of minority status.
- Provide at least three examples of local government clients to which the firm provided or is providing similar services. Include the client name, location and summary of services performed.
- Service Approach: Present your understanding of the Village's needs as a Florida municipality and the scope of services required. Project Staffing, Management, Quality Control Process, and the approach to the Project.
- Cost proposal: Proposal should include a base rate for general support services and a rate schedule for additional specialized services.
- Proof of appropriate state certifications: Provide proof that the Firm is licensed to operate in Florida.
- Qualifications: Please indicate completed projects of similar nature. Also, indicate a contact person for each referenced cited.

*Request for Proposals
Insurance and Risk Management Services
RFP 18-18*

- **References:** References from at least three (3) clients, preferably municipalities for whom the Firm has completed similar projects within the last two (2) years. The references should include the name, address, telephone number and email address of a contact person for each reference cited. References will be verified.
- List of the Firm's insurance policies, the insurer, policy numbers and amount pertaining to required services.
- The Selected Proposer shall give all notices and be responsible for compliance with all permit requirements, laws, ordinances, rules, regulations and lawful orders of any public authority bearing on the performance of the services. The Village shall not be responsible for monitoring the Proposer's compliance with any laws or regulations.
- **Preference for Local Business:** Any business seeking certification as a local business shall provide an executed affidavit, in the Firm's own form, certifying that it meets the criteria established in Village Code Section 2-327(e) for a determination as a local business. A complete copy of the Village's Code of Ordinances can be accessed online by clicking on the 'Municode.com' Quick Link on the Village's website at <http://www.islamorada.fl.us/>.

3.1 INSURANCE

Proposers shall provide with their Proposal evidence of insurance acceptable to the Village and in compliance with the requirements set forth in this RFP and the Contractual Services Agreement.

Upon execution of the Contractual Services Agreement, the Selected Firm shall, at their own expense, procure and maintain throughout the term of the Contractual Services Agreement and any renewals thereof, with insurers acceptable to the Village, the types and amounts of insurance conforming to the minimum requirements:

- A. **Worker's Compensation:** Coverage must apply for all employees and statutory limits in compliance with the applicable state and federal laws. In addition, the policy must include the following:
 1. Employer's Liability with a minimum limit per accident in accordance with statutory requirements.
 2. Notice of Cancellation and/or Restriction. The endorser to provide the Village with thirty (30) days' written notice of cancellation and/or restriction.
- B. **Comprehensive General Liability:** Coverage must include:
 1. \$1,000,000.00 combined limit per occurrence for bodily injury, personal injury and property damage. If contract is less than \$100,000.00, then general liability insurance requirement is \$300,000.00.

2. Contractual coverage applicable to this specific contract, including any hold harmless and/or indemnification agreement.
 3. Notice of Cancellation and/or Restriction. The policy must be endorsed to provide the Village with thirty (30) days' written notice of cancellation and/or restriction.
- C. Comprehensive Automobile Liability- Coverage must be afforded on a form no more restricted than the latest edition of the Comprehensive Automobile Liability Policy filed by the Insurance Services Office and must include:
1. \$300,000 combined single limit per accident for bodily injury and property damage.
 2. Owned Vehicles.
 3. Hired and Non-Owned Vehicles.
 4. Employee Non-Ownership.
 5. Notice of Cancellation and/or Restriction. The policy must be endorsed to provide the Village with thirty (30) days' written notice of cancellation and/or restriction.

Certificates of Insurance evidencing the insurance coverage specified in this Article shall be submitted to the Village with the executed Contract. The Certificates of Insurance shall be filed with the Village before this Contract is deemed approved by the Village. The required Certificates of Insurance not only shall name types of policies provided, but also shall refer specifically to this Contract. All the policies of insurance so required of the Firm shall be endorsed to include as additional insured the Village, its officers, employees, and agents, except for Worker's Compensation. If the initial insurance policy expires prior to completion of the Project, renewal Certificates of Insurance shall be furnished thirty (30) days prior to the date of the policy expiration.

3.2 OTHER SUPPORTING DOCUMENTATION

The Firm may submit additional supporting information which it deems relevant or important to its Proposal under this section. Additional supporting information is limited to twenty (20) pages.

4. PROPOSAL EVALUATION

4.1 EVALUATION COMMITTEE

The Village Manager will appoint staff to serve in the Evaluation Committee. The Evaluation Committee will review, evaluate, and make recommendations regarding the Proposals according to the criteria set forth in this RFP. The Evaluation Committee, at its sole discretion, shall have the right to seek written clarifications and/or additional information from Proposers, and to verify information submitted and check project references, in order to fully understand the Proposals.

4.2 EVALUATION PROCESS

Proposal Documents must be submitted by the Submittal Deadline specified. Once received, the review and notification process will be as follows:

- A. The Evaluation Committee will review and then provide an overall score for each Proposal, rank the Proposals and develop a short list of not less than three (3) Firms, provided that at least three (3) Proposals have been received. If less than three (3) Firms submit Proposals, then the number of Proposals received shall be the Short List. The Evaluation Committee shall provide the rankings and recommended Short List of the Proposers to the Village Council with the recommendation for selection of a Firm.
- B. The Village Council shall review the Evaluation Committee's rankings and Short List and may require Firms to make oral presentations to the Village Council. The Village Council shall make the final selection and award of the Firm and may direct staff to negotiate the Contractual Services Agreement with the Selected Proposer, as it determines to be in the best interest of and most advantageous to the Village. The Village Council shall have the sole and final discretionary authority to evaluate the Proposal Documents submitted and to select the best Proposer.

4.3 EVALUATION CRITERIA

Proposals submitted in response to this RFP will be evaluated and ranked according to the following evaluation criteria set forth in this Section:

<u>Evaluation and Ranking Criteria</u>	<u>Ranking Weight</u>
Price Proposal.....	30 Points
Letter of Introduction.....	20 Points
Related Experience	20 Points
Technical Approach.....	20 Points
References	<u>10 Points</u>
	100 Points

4.4 VILLAGE RIGHTS AND OPTIONS

The issuance of this RFP by the Village is a solicitation for Firms to submit Proposals. The Village reserves the following rights, which shall be exercised in its sole and absolute discretion, including without limitation:

- Supplement, amend, clarify or otherwise modify this RFP;
- Waive minor irregularities and omissions in the information contained in the Proposals submitted and to make all final determinations;

- Not to select any Firm for the award of the Contractual Services Agreement as a result of this procurement process and/or to terminate the procurement process by written notice to the Firms for any reason or no reason whatsoever;
- Change or alter the schedule of events or Project Schedule associated with this procurement process upon notice to the Firms;
- Refuse to evaluate Proposals where the requested Proposal Documents and information and materials are not provided, insufficiently provided, incomplete, or not provided by the Submission Deadline. There is no appeal from a refusal for an incomplete or late Proposal. The Submittal Deadline for Proposals will not be changed in order to accommodate supplementation of incomplete or late submissions;
- Require additional information from one or more Proposers to supplement or clarify the Proposals submitted;
- Conduct investigations, check references, and verify information with respect to qualifications and experience of each Proposer;
- Reject any Proposal found to be irregular, incomplete, conditional, or not in conformance with or not responsive to the requirements of this RFP;
- Receive written questions, requests for clarifications or additional information concerning this RFP from Proposers prior to the deadline for questions, and issue Addenda in response to such questions or requests for clarifications or additional information;
- Cancel this RFP, in whole or in part, if determined to be in the best interests of the Village;
- Take any action affecting this RFP process or the Project that would be in the best interests of the Village;
- Reject any and all Proposals, or part of any or all Proposals, or waive any irregularity, defect or technicality in any Proposal; and
- Suspend or cancel negotiations with the highest ranked and Selected Firm and proceed to negotiations with the next highest ranked Proposer, in its sole and absolute discretion.

All Proposal Documents shall become the property of the Village and will not be returned to Firms except those submittals that are not received by the Submittal Deadline, which shall be rejected and returned unopened to those Firms. The Proposal Documents are a public record, and portions thereof may remain confidential only to the extent specifically exempted by Florida Public Records Law.

Neither the Village, the Evaluation Committee, staff, representatives, consultants, agents nor attorneys will be liable for any claims or damages resulting from the solicitation, collection, review or evaluation of Proposal Documents or submittals related to this RFP.