**CITY OF LEBANON**

**RFQ 21-1844**

**CITY OF LEBANON PROPERTY AND CASUALTY INSURANCE BROKERAGE AND CONSULTANT SERVICES**

**APRIL 2021**

1. **Project Description**

The City of Lebanon, Ohio is requesting that qualified property and casualty insurance brokerage and consulting firms or agents respond to this RFQ if interested in providing consulting services to the City. Lebanon is a full service municipality with 145 full-time staff members that provide electric, water, wastewater, storm water, police, fire, and EMS services in addition to general government services. It is the objective of the City to select a qualified broker and agents to bid out the property and casualty insurance program, which would be effective September 30, 2021.

An information packet outlining the City’s current property and casualty insurance plan is available from Ms. Michelle Horne, Purchasing Supervisor, at 228-3160 or via email at [mhorne@lebanonohio.gov](mailto:mhorne@lebanonohio.gov). Questions regarding the RFQ should be directed to Scott Brunka City Manager, at sbrunka@lebanonohio.gov.

4 copies of the proposals are due to the City Building, 50 S. Broadway Ave., Lebanon Ohio no later than 2:00 p.m. on Wednesday, April 28th, 2021.

Interested parties will need to provide the following information:

1. Name of the agency or brokerage

2. Address of Firm

3. Number of years in business

4. Number of Ohio employees

5. Up to 5 client references similar in nature to Lebanon

1. **Scope of Work**

The desired brokerage firm will have experience in providing municipal property

and casualty insurance services to clients. Services that will be provided include:

1. Representing the City of Lebanon to the Insurance Carriers.
2. Provide advice and counsel to City Staff regarding insurance risk management
3. Completion of written coverage proposal
4. Review of issued policies
5. Solicitation of pricing proposals
6. Responding to carrier inquiries
7. Making final recommendations on insurance carriers
8. Executing policy changes
9. Claim advocacy
10. Reporting of claims
11. Review and assessment of claims history
12. Making recommendations focused on limiting City liability
13. Completion of Certificates of Insurance
14. The City will only consider claims occurred policies

At a minimum, the Consultant shall demonstrate their experience in the municipal insurance field by providing the following information:

1. The number of years of insurance experience for each individual within the brokerage or agency that will be working directly with the City of Lebanon. List specifically how many years of municipal insurance experience these individuals have.
2. A listing of professional designations that the above individuals possess.
3. A listing of all insurance carriers that are represented by the brokerage of agency.
4. A listing of all municipalities that are currently served by the firm.
5. A listing of all public entity clients that operate a Fire Department and/or Police Department.
6. List all other qualifications that you have which are related to all forms of professional liability insurance.
7. Briefly explain the methods employed to assist the City of Lebanon in managing their insurance risk and reducing their cost.
8. **General**
   1. The contracting officer for this project is the City Manager, City of Lebanon, Ohio.
   2. All sub-consultants shall have approval of the City Manager. It shall be the Consultant's responsibility to assure the qualifications of the sub-consultants and the quality of their work.
   3. The City of Lebanon will furnish and/or make available all associated records currently on file. The City of Lebanon does not guarantee the accuracy or completeness of the information. The Consultant shall verify all records and data used for completeness and accuracy.
   4. RFQ responses submitted to and received by the City of Lebanon shall impose no obligation upon the City of Lebanon, which reserves the right to request further responses at its discretion. The City of Lebanon reserves the right to reject any and all RFQ responses, and to waive any and all irregularities. The City reserves the right to select those brokers and agents which in its judgment are most favorable to the City.
   5. All agents and brokers submitting RFQ responses will also provide evidence of insurance agent errors and omission coverage with limits of at least $1,000,000.
   6. Consultant shall submit 4 copies of the RFQ response to the City.

All qualifications will be rated and scored based on the overall quality of proposal, similar project experience, professional personnel qualifications, and reference checks.

RFQ responses shall be submitted to the Lebanon City Building at 50 S. Broadway Avenue, Lebanon Ohio 45036, to the Attention of the City Manager. Responses must be submitted by 2:00 p.m. on Wednesday, April 28th to be considered. Please include the RFQ number and description on the outside of the envelope.