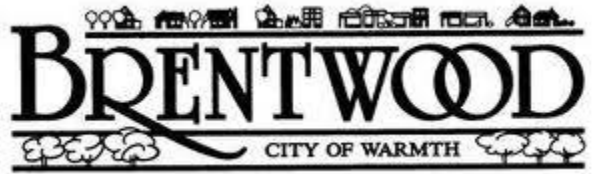


*City of Brentwood  
Human Resources Department  
2348 S. Brentwood Blvd.  
Brentwood, MO 63144  
(314) 963-8609 Direct*



## **REQUEST FOR PROPOSAL INSURANCE CONSULTANT**

### **INTRODUCTION**

#### **A. General Information**

The City of Brentwood, Missouri, (City) is issuing a Request for Proposals (RFP) from qualified firms or individuals to review current insurance policies to ensure proper coverage and cost effectiveness. The policies of concern are those primarily related to liability, to include Public Officials, Property and Casualty, Employment Practices Liability, Etc.

#### **B. Background**

The City of Brentwood has a population of approximately 8,500 and operates under the Council/Manager form of government. The City provides general municipal services and employs approximately 110 full-time employees and approximately 70 part-time employees to include public safety (Police and Fire/EMS). The City has 5 main properties that house a variety of employees as well as numerous other buildings. The City has a fleet of vehicles that include police and fire vehicles, public works vehicles, and numerous standard vehicles.

### **SCOPE OF SERVICES**

The City would like a consultant to review insurance policies to ensure proper levels of coverage and cost effectiveness. Should deficiencies be present, a recommendation should be made to ensure proper coverage. A final report should be compiled along with a presentation prepared for presentation to the Board of Aldermen that would include any recommendations.

- 1) Insurance Services to be Reviewed:
  - Public Officials Insurance Coverage
  - Property and Casualty
  - Auto Liability
  - Liability
  - Employment Practices Liability
- 2) Sample Timeline

<b>Estimated Milestone Dates</b>	<b>Task</b>
August 28, 2020	<ul style="list-style-type: none"> <li>Proposals due by this date</li> </ul>
September 18, 2020	<ul style="list-style-type: none"> <li>Successful firm notified</li> </ul>
Week of September 24, 2020	<ul style="list-style-type: none"> <li>Planning meeting with City management team approving final project work and timelines</li> </ul>
Week of October 05, 2020	<ul style="list-style-type: none"> <li>Firm begins project work</li> </ul>
Week of October 19, 2020	<ul style="list-style-type: none"> <li>Draft Final Report submitted for review.</li> </ul>
October 26, 2020	<ul style="list-style-type: none"> <li>Final Report submitted.</li> </ul>
November 2, 2020	<ul style="list-style-type: none"> <li>Presentation of Final Report to Board of Aldermen and Mayor</li> </ul>

## **SUBMISSION REQUIREMENTS**

The proposal for services must, at a minimum, include the following:

- The firm's name and location of the office providing the services under the contract, telephone number and e-mail address.
- A general description of the firm, including size, number of employees, primary business, and other business or services offered.
- Identification of the project manager who will be the primary contact through all phases of the project, as well as identification of other personnel who will be performing engagement work and estimated expected contribution to the project in percentage of hours.
- Summary information regarding the qualifications and professional experience of staff who will perform work under this engagement.
- Description of the firm's experience in providing services similar to those in the Scope of Services for municipal clients.
- List of references of at least three municipal clients for which services have been provided which are similar to those in the Scope of Services of this document. References should include client name, address, telephone number and email address for the contact person in each organization. Also include the services provided and total fees paid by each referenced agency for the project.
- Fees should be submitted on the Proposal Submission Form, or similar form, provided in this document, divided by category of service.
- Proposal Submission Form should include a signature of a representative of the firm with acknowledgement that such individual is authorized to bind the firm contractually.
- Proposals shall provide a statement as to whether any portion of work performed under this proposal will be subcontracted or performed under a partnership or joint venture. Information on such entities must be included in the proposal such as related experience and qualifications of assigned staff.
- Submissions should also include sample interim and final report formats.

## **SELECTION CRITERIA**

All proposals will be reviewed to determine compliance with requirements of the RFP. Primary factors in the evaluation include, but will not necessarily be limited to:

- Firm's demonstrated experience in providing similar services to municipal clients as identified in the Scope of Services.
- Staff's demonstrated qualifications and expertise regarding relevant experience with municipal clients.
- The ability of the firm to provide the requested services as demonstrated in the proposal.
- Firm's past record of performance, if any, with respect to quality of work and ability to meet stated timelines.
- The quality, conciseness, and completeness of the proposal.
- Project timeline.
- Proposed fees.

### **SUBMISSION OF PROPOSAL AND OTHER RELATED INFORMATION**

Proposals should be brief and concise (6-10 pages), plus sample reports. Responses should be in PDF format and submitted electronically. The deadline for proposal submission is below:

**3:00 P.M. on Friday, August 28, 2020**

All responses should be delivered by the stated deadline electronically to:

[cityclerk@brentwoodmo.org](mailto:cityclerk@brentwoodmo.org)

Firms are expected to fully utilize the city's web site to gain more information and answer most questions from this resource. Questions regarding the RFP that cannot be answered from study of the City's web site should be directed in writing to Jason Kotz, primary contact for the City at:

Jason Kotz

Human Resources Manager

(314) 963-8609

[jkotz@brentwoodmo.org](mailto:jkotz@brentwoodmo.org)

A proposal may be withdrawn any time prior to the deadline by written notification. The proposal may be resubmitted with any modifications, prior to the deadline.

The City reserves the right to accept or reject any and all proposals or to choose no firm.

The successful firm will be required to meet standard City insurance requirements.

# PROPOSAL SUBMISSION FORM

*Note: Failure to provide the information requested on this form may be cause for rejection of your proposal on the grounds of non-responsiveness.*

**Business Name:**

\_\_\_\_\_

Federal Tax ID Number:

\_\_\_\_\_

Street Address:

\_\_\_\_\_

Mailing Address if Different:

\_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Mailing

Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-Mail: \_\_\_\_\_

## FEE PROPOSAL

INSURANCE CONSULTATION	FEE PROPOSED
TOTAL	\$

## AUTHORIZED SIGNATURE

*Must be signed by a person having the authority to contractually bind the business listed above.*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Print Name and Title*

\_\_\_\_\_  
*Phone Number*