



Solicitation Number: RFP21000005

Insurance Brokerage Services

Request for Proposal (RFP)

City of Pittsburgh

January 12, 2021 - February 16, 2021

General Header Information

No. RFP21000005
Title: Insurance Brokerage Services
Type: Formal Request for Proposal (RFP)
Who can see this bid?: Everyone
Start Date: January 12, 2021 at 3:00:00 PM EST
End Date: February 16, 2021 at 3:00:00 PM EST
Vendor Q&A Start Date:
Vendor Q&A End Date:
Estimated Total Value:
Who can respond to this bid? : All Vendors
Description: The City of Pittsburgh (City) is seeking proposals from qualified and experienced insurance agents, brokers, and direct writers to this Request for Proposal (RFP) for the Performance of Insurance Brokerage Services for the City.
Justification:
Delivery Terms: Free On Board Destination
Payment Terms: Vendor Specified
Contact Information: City of Pittsburgh
Dan Tobin
414 Grant Street Room 502 Office of Management and Budget
Pittsburgh PA, 15219 United States
Tel: 412-255-2458
Fax:
daniel.tobin@pittsburghpa.gov
Contact Details: If you have any questions, Please contact:
Dan Tobin
414 Grant Street Room 502 Office of Management and Budget
Pittsburgh PA, 15219 United States
Tel: 412-255-2458
Fax:
daniel.tobin@pittsburghpa.gov
Selected Categories: Financial Instruments, Products, Contracts and Agreements (64000000)
Financial and Insurance Services (84000000)

Solicitation Requirements: Tentative Schedule of Events

Tentative Schedule of Events

The following represents the tentative schedule for this project. Any change in the scheduled dates for the Pre-Proposal Conference (if applicable), Deadline for Submission of Written Questions, or Proposal Submission Deadline will be advertised in the form of an addendum to this RFP. The schedule for the evaluation process and other future dates may be adjusted without notice.

RFP released:	<i>January 12, 2021</i>
Cut-off questions:	<i>January 28, 2021, 3:00 PM</i>
Proposal submission deadline:	<i>February 16, 2021, 3:00 PM</i>
Proposal review & supplier scoring:	<i>February, 2021</i>
Contract award:	<i>February, 2021</i>
Council approval:	<i>March, 2021</i>
Project start date:	<i>Date of contract execution</i>

Scope of Services

Background

The City of Pittsburgh (City) is seeking proposals from qualified and experienced insurance agents, brokers, and direct writers to this Request for Proposal (RFP) for the Performance of Insurance Brokerage Services for the City. Currently the City spends roughly \$1 million dollars annually for insurance but is looking to reduce costs as much as possible by right-sizing our coverages. Additionally, through a comprehensive risk analysis are seeking recommendations on coverages we do not currently have but should consider. The City intends to engage one Respondent to provide such Services.

Scope Details

Respondent shall specialize in insurance brokerage services of all types and have all appropriate licenses to provide such services. Specifically the Respondent shall be able to provide, including but not limited to, coverage for the following products (current policies attached as Appendices):

- Commercial Property
- Cyber Security
- Crime
- EMS Errors and Omissions
- Cameras on non-City owned property
- Fire Boat insurance
- EMS Rescue Boat insurance
- Excess Worker's Compensation insurance

Respondent shall:

- Provide an initial comprehensive risk analysis on all current policies and provide a recommendation for policy changes by March 31. Recommendations for additional coverages the City should consider should also be part of this review (i.e. auto coverage on non-Public Safety vehicles).
- Obtain proposals for those coverages and assist the City in executing policies prior to their April 30, 2021 expiration. Provider shall make a recommendation to the City as to the most comprehensive coverage at the best overall value to the City. Provider shall also make recommendations as to the length of the policies (annual or multi-year)
- Provide an annual full review of coverages and recommend any changes in coverage for the following years.
- Provide quarterly reviews of coverages and make any necessary changes that may be required mid-term.
- Provide assistance in processing any claims with the Insurer(s).

These services shall be provided at no cost to the City. Respondent shall be compensated for their services only by the commission received by the Insurers for any/all policies purchased under this agreement.

Broker shall be available upon reasonable notice to meet virtually with City's members, officers, committees and staff as necessary. Should an on-site meeting be necessary all costs of travel would be at Broker's expense.

Appendix Items

Appendix A – Property Policy

Appendix B – Camera GL Policy

Appendix C - EMS E&O Policy

Appendix D - Crime and Fidelity Policy

Appendix E - Cyber Policy

Appendix F - Excess Liability Cyber Policy

Appendix G - Excess Workers Compensation Policy

Appendix H - Fire Boat Policy

Appendix I - Rescue Boat Policy

Proposal Format

Format Requirements

All submitted responses shall follow the formatting below, and all proposals will need to be provided electronically through Beacon. Each numbered section is to be uploaded as a separate file. If hard copies of submissions are required, each numbered section shall be a removable tab. Document pages shall be 8-1/2 inches by 11 inches in size or folded to such a size.

1. Response to Scope

1. Firm's Qualifications, Experience and References

2. Qualifications of Team

3. Project Approach and Plan

Failure to include all of the elements specified may be cause for rejection. Additional information may be provided, but should be succinct and relevant to the goals of this RFP. Excessive information will not be considered favorably.

If additional hard copies are requested under Submittal Requirements, the proposal should be bound or contained in a loose leaf binder. Document pages shall be 8-1/2 inches by 11 inches in size or folded to such a size. Use section dividers, tabbed in accordance with this Section as specified below. All proposals will need to be provided electronically so the following format will apply for the electronic submittal through the Beacon website.

Firm's Qualifications, Experience & References

Describe the firm and provide a statement of the firm's qualifications for providing the scope of services. Identify the services which would be completed by your firm's staff and those that would be provided by sub-consultants, if any. Identify any sub-consultants you proposed to utilize to supplement your firm's staff.

Provide a summary of the firm's experience in providing these or similar services. Provide a minimum of three references for related projects, including dates, contact person, phone number, email, and a brief description of the project or scope of work.

Qualifications of Team

Provide a brief summary of the qualifications and experience of each team member assigned to this project, including length of service with the firm and resume/bio, and the qualifications /experience of any sub-consultant staff on your project team.

Project Approach and Plan

Provide a detailed discussion of your firm's approach to the successful completion of the scope of services outlined in this RFP. Include thorough discussions of methodologies you believe are essential to accomplishing this project or completing the scope of services. Include a proposed work schedule to accomplish all of the required tasks within the desired timeline. Identify the staff roles who would be assigned to each major task, including sub-consultants.

Submittal Requirements

Submittal Requirements

1. All respondents must register on Beacon to submit a bid for this opportunity. The registration link can be found here: <http://pittsburghpa.gov/beacon/registration.html>
2. Once registered, respondents must login and find the solicitation for which they intend to submit a proposal. The list of solicitations can be found here: <http://pittsburghpa.gov/beacon/bid-opportunities.html>
3. If additional assistance is needed with registration or submitting a proposal in response to the solicitation, please email support webprocure-support@proactis.com or call the support line at 866-889-8533.
4. Respondents must submit their proposals electronically within the eProcurement tool located on Beacon by the submission deadline.
5. Respondents are required to provide one (1) electronic copy of their proposal in either MS Word or PDF by the submission deadline.
6. Questions regarding proposals should be delivered **ONLY** to the Sourcing Specialist, whose contact information can be found in the header of this solicitation.
- 7 Additional submission considerations:
 - Late proposals will not be accepted or considered. Respondents should allow enough time to register company on Beacon, search the solicitation they wish to respond to and complete the submission process online before the deadline.
 - The City of Pittsburgh shall not be responsible for proposals delivered to a person or location other than that specified herein.
 - All submittals, whether selected or rejected, shall become the property of the City of Pittsburgh and will not be returned.
 - All costs associated with proposal preparation shall be borne by the applicant.

Proposal Evaluation & Selection

Selection Procedure

1. Your Proposal will be evaluated by a Proposal Committee comprised of the Director or other supervisor of the Using Department, one or more members of the Director's staff, at least one member of the Office of Management & Budget and any other department representatives as deemed necessary.
2. Submittals will be reviewed for responsiveness, and responsive submittals will further be screened by a selection committee in accordance with the criteria listed below. The firm(s) submitting the highest rated proposal may be invited for interviews.

Criteria

All proposals will be evaluated using the following criteria:

- Firm's Qualifications, Experience and References (25 points)
- Qualifications of Team (25 points)
- Project Approach and Plan (50 points)

Award and Contract

Award

After the City has received all Proposals and conducted its initial Evaluation, described above, the Proposal Committee may invite one or more Respondents to a follow-up interview to further discuss their Proposal(s).

The Proposal Committee may decide to accept the Proposal of one or more Respondents. It may decide to reject all proposals. Once a Proposal is accepted, the contract negotiation process will commence. This RFP and your response to it, in the form of your entire Proposal, will become part of the Contract. If a real or apparent conflict should arise between this RFP/Proposal and other language contained in the final Contract, the language of the final Contract shall control.

Contracting Process

Successful Respondents will be required to enter into a Contract with the City of Pittsburgh, contingent upon the approval of City Council. This Contract will be directed and managed by the issuing department and the Office of Management & Budget.

Work cannot commence on the Scope of the RFP until it a contract is fully executed. The City cannot process invoices nor approve payments until this Contract has been fully executed by the Respondent and all required City signatories, including the issuing department, the Law Department, and the City Controller.

City laws and policies mandate the incorporation of various custom terms and conditions into all City contracts. For this reason the City will not sign any standard contract proffered by the respondent.

An agreement shall not be binding or valid with the City unless and until it is fully executed by authorized representatives of the City and of the Proposer. Once the Contract is fully executed the City will notify Respondent in writing and give the order to proceed.

General Terms & Conditions

Examination of Proposal Documents

1. The submission of a proposal shall be deemed a representation and certification by the Respondent that they:

- Have carefully read and fully understand the information that was provided by the City to serve as the basis for submission of the proposal
- Have the capability to successfully undertake and complete the responsibilities and obligations of the proposal being submitted.
- Represent that all information contained in the proposal is true and correct.
- Did not, in any way, collude; conspire to agree, directly or indirectly, with any person, firm, corporation or other proposer in regard to the amount, terms or conditions of this proposal.
- Acknowledge that the City has the right to make any inquiry it deems appropriate to substantiate or supplement information supplied by a proposer, and proposer hereby grants the City permission to make these inquiries, and to provide any and all related documentation in a timely manner.

2. No request for modification of the proposal shall be considered after its submission on the grounds that the proposer was not fully informed to any fact or condition.

RFP Term

Respondent's proposal shall remain firm and effective, subject to the City's review and approval, for a period of one hundred twenty (120) days from the closing date for the receipt of proposals.

The City may enter into negotiations with one or more Respondents during the one hundred twenty (120) day period during which all proposals will stay effective. The purpose of such negotiations will be to address questions and identify issues as the parties move towards the execution of a final contract or contracts.

RFP Communications

Unauthorized contact regarding this RFP with employees or officials of the City of Pittsburgh other than the RFP Coordinator named in the header section of this solicitation may result in disqualification from this procurement process.

Neither Respondent(s) nor any person acting on Respondent(s)'s behalf shall attempt to influence the outcome of the award by the offer, presentation or promise of gratuities, favors, or anything of value to any appointed or elected official or employee of the City of Pittsburgh, their families or staff members. All inquiries regarding the solicitation are to be directed to the designated RFP Coordinator. Outside of pertinent RFP questions directed to the City of Pittsburgh as specified above, any other attempts to contact any City of Pittsburgh personnel regarding this RFP, without prior approval by the RFP Coordinator will be considered grounds for dismissal and immediate disqualification from the RFP process. This includes, but is not limited to, all verbal, voice, text, e-mail, and social media (e.g. – LinkedIn) contact.

Please note the following:

- The City shall not be responsible for nor bound by any oral instructions, interpretations or explanations issued by the City or its representatives.
- Each proposer shall assume the risk of the method of dispatching any communication or proposal.
- The RFP Coordinator must receive all written comments, including questions and requests for clarification, no later than the Deadline for Submission Questions listed in the tentative project schedule.
- The City reserves the right to determine, at its sole discretion, the appropriate and adequate responses to written comments, questions, and requests for clarification. The City's official responses and other official communications pursuant to this RFP shall constitute an addendum of this RFP.
- The City will publish all official responses and communications pursuant to this RFP to the City of Pittsburgh procurement website. It is the responsibility of each proposer to check the site and incorporate all addenda into their response.

- All addenda for this RFP will be distributed via the City of Pittsburgh procurement website at procurement.pittsburghpa.gov/beacon/opportunities

- Only the City's official, written responses and communications shall be considered binding with regard to this RFP.

Addenda/Clarifications

Should discrepancies or omissions be found in this RFP or should there be a need to clarify this RFP, questions or comments regarding this RFP must be put in writing and received by the RFP Coordinator as outlined in the submittal requirements section of this solicitation.

Withdrawal of Proposals

A proposer may withdraw its proposal at any time before the expiration of the time for submission of proposals as provided in this RFP by delivering a written request for withdrawal signed by, or on behalf of, the proposer.

Public Record

Respondent, by submittal of a proposal, acknowledges that all proposals may be considered public information in accordance with the Commonwealth of Pennsylvania Right to Know laws. Subject to award of this RFP, all or part of any submittal may be released to any person or firm who may request it. Therefore, proposers shall specify in their proposal response if any portion of their submittal should be treated as proprietary and not releasable as public information. Proposers should be aware that all such requests may be subject to legal review and challenge.

Any information considered proprietary should be indicated as such or not included in the response.

Non-Conforming Proposal

A proposal shall be prepared and submitted in accordance with the provisions of these RFP instructions and specifications. Any alteration, omission, addition, variance, or limitation of, from or to a proposal may be sufficient grounds for non-acceptance of the proposal, at the sole discretion of the City.

Disqualification

Factors such as, but not limited to, any of the following may be considered just cause to disqualify a proposal without further consideration:

- Evidence of collusion, directly or indirectly, among proposers in regard to the amount, terms or conditions of this proposal;
- Any attempt to improperly influence any member of the evaluation team;
- Existence of any lawsuit, unresolved contractual claim, or dispute between the proposer and the City;
- Evidence of incorrect information submitted as part of the proposal;
- Evidence of proposer's inability to successfully complete the responsibilities and obligation of the proposal; and
- Proposer's default under any previous agreement with the City, which results in termination of the agreement.

Restrictions on Gifts & Activities

The City of Pittsburgh Ethics Code and Chapter 198 of the City Code (Code of Conduct) was established to promote public confidence in the proper operation of our local government. These resources outline the requirements for disclosure of interests and restricted activities as related to public procurement processes. Proposers are responsible to determine the applicability of these requirements to their activities and to comply with its requirements.

Rights of the City of Pittsburgh

This RFP does not commit the City to enter into a contract, nor does it obligate the City to pay for any costs incurred in preparation and submission of proposals or in anticipation of a contract. The City reserves the right to:

- Reject any and all proposals;
- Issue subsequent Requests for Proposals;
- Cancel this RFP with or without issuing another RFP;
- Remedy technical errors in the Request for Proposals process;
- Approve or disapprove the use of particular sub-consultants;
- Make an award without further discussion of the submittal with the proposer (therefore, the proposal should be submitted initially on the most favorable terms that the firm or individual might propose);
- Meet with select proposers at any time to gather additional information;
- Make adjustments to the scope of services at any time if deemed by the Office of Management and Budget to be in the best interest of the City;
- Accept other than the lowest offer.
- Waive any informality, defect, non-responsiveness, or deviation from this RFP that is not material to the Respondent's proposal;
- Reject the proposal of any Respondent who, in the City's sole judgment, has been delinquent or unfaithful in the performance of any contract with the City;
- Reject the proposal of any Respondent who, in the City's sole judgment, is financially or technically incapable of performing in accordance with this RFP;
- Negotiate with any, all, or none of the Offerors and to enter into an agreement with another Offeror in the event that the originally selected finalist defaults or fails to execute an agreement with the City.
- Award a contract to the firm(s) that presents the best qualifications and whose proposal best accomplishes the desired results; and/or
- Enter into an agreement with another proposer in the event the originally selected proposer defaults or fails to execute an agreement with the City.
- Require a performance bond and/or other "failure to deliver" agreement by the awardee at time of contracting.

Miscellaneous Requirements

Acknowledgements

- 1. Conflict of Interest**-By submission of a proposal to this solicitation, Respondent agrees that it presently has no interest and shall not have any interest, direct or indirect, which would conflict in any manner with the performance of the services required under this RFP.
- 2. Code of Ethics**-By submission of a proposal to this solicitation, Respondent agrees to abide by the Code of Ethics of The City of Pittsburgh. The full Ethics Handbook can be found here:http://pittsburghpa.gov/humanresources/files/policies/10_Ethics_Handbook.pdf
- 3. Fair Trade Certification**-By responding to this solicitation, the Respondent certifies that no attempt has been made, or will be made, by the Respondent to induce any other person or firm to submit or not to submit a submission for the purpose of restricting competition.
- 4. Non-Disclosure**-By responding to this solicitation, the Respondent acknowledges they may be required to sign a Non-Disclosure Agreement during the contracting process if they are the successful respondent.
- 5. Debarment** -This solicitation is also subject to Section 161.22 of the City of Pittsburgh Code related to debarment from bidding on and participating in City contracts.
- 6. Financial Interest**-No proposal shall be accepted from, or contract awarded to, any individual or firm in which any City employee, director, or official has a direct or indirect financial interest in violation of applicable City and State ethics rules. Entities that are legally related to each other or to a common entity which seek to submit separate and competing proposals must disclose the nature of their relatedness.
- 7. Full Fee Disclosure**-Pursuant to Section 161.36 of the Pittsburgh City Code, a Respondent must include a disclosure of any finder's fees, fee splitting, firm affiliation or relationship with any broker-dealer, payments to consultants, lobbyists, or commissioned representatives or other contractual arrangements of the firm that could present a real or perceived conflict of interest.

Questionnaire:

Required Documents

Description: Please fill in the following required documents/information

Upload completed vendor contact sheet

Type ATTACHMENT
Is Required Y

Upload completed updated W9

Type ATTACHMENT
Is Required Y

Upload completed Vendor Registration Form

Type ATTACHMENT
Is Required Y

Upload completed Statement of Affiliation

Type ATTACHMENT
Is Required Y

Provide the name, title, & email address of the authorized signer for your company (for details on who is considered an authorized signer, please look at our terms & conditions section)

Type TEXT
Is Required Y

Documents:

Statement of Affiliations.pdf

Vendor Contact Sheet.pdf

Vendor Registration Form.pdf

W9.pdf

Appendix A - Property Policy.pdf

Appendix B - Camera GL Policy.pdf

Appendix C - EMS E and O Policy.pdf

Appendix D - Crime and Fidelity Policy.pdf

Appendix E - Cyber Policy.pdf

Appendix F - Excess Liability Cyber Policy.pdf

Appendix G - Excess Workers Compensation Policy.pdf

Appendix H - Fire Boat Insurance.pdf

Appendix I - Rescue Boat Policy.pdf

Addendum 1 - QA Document.docx

Solicitation has been designated as having no line items.

This bid does not have any evaluation committee

Vendors Who Will Receive Solicitation by Email/Fax:

Activist Legal LLP
Adcomp Systems Inc
Advanced Energy Solutions
ADVANTECH INC
African American Chamber Foundation of Western PA
AH Actuarial Solutions
AHP Servicing LLC
Alisha L Branson
Alliant Insurance Services
ALROWS LLC
American General Services
American Municipal Tax-Exempt Compliance Corporation
AmeriServ Financial Bank
Andrea Geraghty
Aon Risk Services Central Inc
Arthur J Gallagher Risk Management Services Inc
Ask IT Consulting Inc. (Self Invited)
Atrium Staffing LLC
AVENU INSIGHTS AND ANALYTICS LLC
Baker Tilly Virchow Krause, LLP
Bancroft Capital LLC
Bank of America NA
Benefits Plus Consulting Group Inc
Berry, Dunn, McNeil Parker, LLC
BKD, LLP
BNY Mellon Capital Markets
BROADRIDGE FINANCIAL SOLUTIONS INC
Broniec Associates
CBIZ Insurance Services Inc
Ceridian HCM Inc
Certified Credit Reporting
Christine Michel Enterprises, LLC.
Cigna Health and Life Insurance Company
Citibank NA
Citizens Bank National Association
Citizens Bank National Association

City of Pittsburgh Procurement (Self Invited)
Clark Hill PLC
Clearwater Analytics
Community First National Bank
Competitive Energy Services LLC
CONDUENT STATE LOCAL SOLUTIONS, INC.
Copper Claims Services Inc
Cummins Allison
DDI Leasing Inc
Doherty and Associates
Dollar Bank FSB
Downstream Strategies LLC
Drexel Hamilton, LLC
Duane Morris Government Strategies LLC
E H Griffith
e. Republic, Inc. (Self Invited)
Empathia, Inc.
Engle Hambright Davies Inc
Epiq Global
Exchange Underwriters Inc (Self Invited)
Fast LP
First Commonwealth Financial Corporation
FIRST NATIONAL BANK
First National Insurance Agency LLC
Forte Payment Systems
FTI Consulting Inc
Govolution
Grant Thornton LLP
Growth Capital Management, LLC
H Rizvi Consulting Inc
Henderson Brothers Inc
Herbein Company
I.C. System, Inc.
Identity Theft Guard Solutions
IMA (Self Invited)
IMG Advisory LLC
Independent Living Systems LLC

Innovative Claims Strategies LLC
Inservco Insurance Services
Jacobson Associates Inc
James L Smith Insurance Agency Inc
JPMorgan Chase Bank
k
Kabeyia Kompany LLC
Karen Peterson-Colonial Life
KBI SYSTEMS LLC
KBM Management Inc
KeyBank USA NA
KLM Consulting LLC DBA Kompl
Korn Ferry International
KPMG
KS StateBank
KUBRA Data Transfer Ltd
Lamont Financial Services Corporation
Laurel Mountain Leasing
Leasing 2 Inc
Lu Zhu
LUMSDEN INSURANCE AGENCY
Maher Duessel
Malor Company Inc
Managed Medical Review Organization, Inc. MMro
Mandli Communications
McGowan Governmental Underwriters
McGriff Insurance Services Inc (Self Invited)
MCH Virtual Solutions LLC
Medical Receivables Solutions, Inc.
MedTech Enginuity Corp.
MGT of America Consulting LLC
MGT of America Consulting LLC
MJ Brunner Inc
MuniServices LLC
National Processing Solutions
Nationwide Credit Corporation
Nesco Resource, LLC

Netra Helping Hotline Corporation
Nivo1 LLC
Northwest Bank
Open Access Technologies Inc
Palisade Capital Management LLC
Paylocity Corporation
Pinnacle Actuarial Resources, Inc.
Pittsburgh Water and Sewer Authority
PNC Bank National Association
PREA Auditors of America, LLC
PricewaterhouseCoopers Public Sector LLP
Primal Equity Partners
Republic First National Corporation
RFx Analyst, Inc.
Riverside Sales Group LLC
SB Friedman Development Advisors
Schneider Downs Co Inc
Sedgwick Claims Management Services Inc
SG Americas Securities LLC
Sierra wo Wires Inc (Self Invited)
Southeast Series of Lockton Companies LLC
SPECIALTY PRIVATE INVESTIGATORS INCORPORATED
Standard Bank PaSB
Standard Insurance Company
Stern Brothers Co.
SUSQUEHANNA ACCOUNTING CONSULTING
Sustainability Partners LLC
Swift Break Group LLC
Taylor Oswald LLC
The Execu|Search Group, LLC
The Fedeli Group
The Home Depot
The Huntington National Bank
The Segal Company
The Segal Company Midwest Inc
The Yorke Agency inc (Self Invited)
Tryon Clear View Group

Tyrone A Goodwin MBA
UBS Financial Services Inc.
UCCS
Unemployment Insurance Services Inc
Urban Redevelopment Authority of Pittsburgh
USI Insurance Services National
Veracity Consulting Group LLC an RGP company
Verdant Accounting P.C.
Verizon Wireless
Veterans Express Total Services Inc
Vidhwan Inc DBA E-Solutions
Vidhwan inc DBA e-solutions
W D EPPS LLC
Wall Capital Group LLC
Weitzman Associates LLC
WELLS FARGO
Wells Fargo Bank
WGL Energy Services Inc
Willis Towers Watson (Self Invited)
World Wide Technology
Xyple LLC
Zelenkofske Axelrod LLC
Zions Bancorporation National Association