



## **OVERVIEW**

The purpose of this Request for Qualification (“RFQ”) is to select an insurance broker for Metropolitan Ministries’ property and casualty program.

## **PROPOSAL FORMAT, TIMETABLE, AND SUPPORTING INFORMATION**

### **Minimum Qualifications**

Respondents who have met the RFQ qualifications will be evaluated on the following criteria:

- Quality and Experience of Client Executive/Broker and Service Team
- Overall Firm Experience/Qualification
- Claim Management/Oversight
- Day to Day Level of Service
- Desirability of Firm Approach as a Risk Management Partner

### **Instructions to Respondents**

1. Submit the proposal and company literature in PDF format via email to:  
amy.kern@metromin.org
2. Please include any Firm informational material that would be helpful.
3. All proposals shall become the property of the Company and shall not be returned to the respondent.
4. All submitted proposals must be signed by an officer or duly authorized representative of the Respondent.
5. All proposals shall be in the format required and specified in this RFQ.
6. Metropolitan Ministries, Inc. reserves the right to reject any and all proposals. If the requirements change during this period, the Company will issue revisions to all parties or will withdraw the offering.
7. The proposals shall be evaluated in accordance with Selection Criteria Items specified in this RFP.
8. The Company reserves the right to conduct oral interviews of Respondents and/or request formal presentations by Respondents.
9. The Respondent must meet all licensing requirements necessary to conduct business in Florida in regard to the scope of services required herein.
10. The Company will not reimburse Respondents for costs associated with the preparation, submission, or requested clarification of any proposal.
11. The Company strictly prohibits discrimination by any party under this engagement as to race, sex, color, creed, national origin, or handicap.

Providing comprehensive care for poor and homeless families in Tampa Bay  
2002 North Florida Avenue | Tampa, Florida 33602 | 3214 US Highway 19 North | Holiday, FL 34691 | metromin.org

## **Timetable**

The timetable below identifies the activities and schedule as a guideline for broker's reference.

<u>Activity</u>	<u>Date</u>
RFP Issued	11/1/2018
Written Responses Due	11/30/2018
On Site Presentations	TBD
Broker Selection Named	12/14/2018
Transition Commencement	02/01/2019

## **WRITTEN RESPONSE PORTION OF RFP**

### **Overview**

1. A description of the business organization (e.g., corporation, partnership, joint venture, etc.) of each firm, its ownership and its organizational structure.
2. History of the organization and length of time in business.
3. Size of organization (e.g., number of offices, partners, and professional staff).
4. The number of employees within your organization and listing of key offices relevant to the Company.
5. Whether the business organization or any of its principals is now or has been involved in any bankruptcy or reorganization proceedings in the last ten years. If yes, please explain.
6. Was the organization subject to any disciplinary action over the last three years?
7. Are there any judgments, claims, arbitration proceedings or suits pending or outstanding against your organization or its officers?
8. Provide evidence of your organization's Errors and Omissions, General Liability and Auto Insurance, including the coverage amount, and the provider. We require minimum E&O limits of \$10,000,000.

### **Non-Profit Experience**

1. Detailed description of your Non-Profit Organization Practice – staffing, experience and capabilities.
2. What are the names of your top 3 Non-Profit clients most similar to Metro Min.
3. Specify lines of coverage brokered on behalf of other Non-Profits along with the provider's rating, noting that we require an A rating or higher as per our debt compliance requirements.
4. Who is your proposed service team for our account?
5. What are the specific roles and responsibilities of each team member?
6. Provide a roadmap of your marketing and underwriting process that differentiates your firm from other brokers. Do you use any third party intermediaries?
7. Briefly describe the technological capabilities and on-line services available to the Company.
8. Based on your knowledge of our industry, briefly describe the risks you see us would be facing. To include, multiple properties, youth activities, Florida specific

- risks, construction insurance etc.
9. Describe your in-house P&C claims handling resources and capabilities and associated fees.
  10. Describe your in-house Loss Control resources and capabilities and associated fees.
  11. Describe your firm's training and educational resources available to mitigate risk and claims.
  12. Describe your firm's process to evaluate and monitor the financial solvency of carriers, including the communication process with clients.
  13. How is normal information regarding the insurance services communicated to the client?
  14. Describe your ability to access specialty markets that may benefit Metro Min.
  15. Describe markets to which you would not have access.
  16. Provide a tentative schedule for performing key aspects of the insurance services.
  17. Provide at least three references of current non-profit clients.
  18. Describe your firms Philanthropic efforts and sponsorships.

**Proposal Submission:**

Please address all questions and written proposals to

Metropolitan Ministries, Inc.  
ATTN: Amy Kern, CFO  
2002 N. Florida Avenue  
Tampa, FL 33602

Email submissions are accepted and can be emailed to [amy.kern@metromin.org](mailto:amy.kern@metromin.org)