

**REQUEST FOR PROPOSALS FOR INSURANCE BROKERAGE SERVICES**



**Bid #17-47**  
**Proposal Submittal Due Date: October 19, 2017**

## **TABLE OF CONTENTS**

<b>I.</b>	<b>Scope of Work</b>	<b>3-4</b>
<b>II.</b>	<b>Terms &amp; Conditions</b>	<b>5</b>
<b>III.</b>	<b>Format and Content of RFP</b>	<b>5</b>
<b>IV.</b>	<b>Submission of Proposals</b>	<b>5-6</b>
<b>V.</b>	<b>Evaluation Criteria and Selection Process</b>	<b>7</b>
<b>VI.</b>	<b>Tentative Schedule</b>	<b>7</b>
	<b>Attachment 1- Professional Services Agreement</b>	<b>8-18</b>
	<b>Attachment 2- RFP Questions</b>	<b>19-20</b>
	<b>Attachment 3- References</b>	<b>21</b>
	<b>Attachment 4- City Holiday Closures</b>	<b>22</b>
	<b>Attachment 5- Insurance Placement Schedule</b>	<b>23-24</b>
	<b>Attachment 6- Cost Proposal</b>	<b>25</b>
	<b>Attachment 7- Exceptions to Specifications</b>	<b>26</b>

**REQUEST FOR PROPOSALS FOR  
INSURANCE BROKERAGE (BROKER) SERVICES**

**CITY BACKGROUND GENERAL INFORMATION ABOUT THE CITY**

The City of Beverly Hills was incorporated in 1914 under the general laws of the State of California and is a long-established residential city and commercial center located within Los Angeles County in Southern California. The City, located 10 miles west of the Los Angeles City Hall, occupies a land area of approximately 5.7 square miles and serves a residential population of 34,763. The City estimates that services are provided to a daytime population of 100,000 to 150,000 persons during the day. Please review City website [www.cityofbeverlyhills.org](http://www.cityofbeverlyhills.org) for all Departments and services offered.

**I. SCOPE OF WORK**

The City of Beverly Hills ("City") is seeking proposals for broker services in accordance with this Request for Proposals (RFP).

The City is seeking an experienced, responsible, capable and professional firm to serve as the Property & Casualty Insurance Consultant/Broker of Record for the insurance placements listed in Attachment 5 on behalf of the City of Beverly Hills. Broker will work directly with the Risk Management Division on all renewal strategies, placements, and serve in an advisory capacity for certain claims brought against the City. The successful firm will assume immediate responsibility for marketing the various insurance placements and providing services that insure that the City is being serviced at the highest level of quality while employing an expected level of fiscal responsibility. Proposals will be evaluated to ascertain which proposer best meets the needs of the City

The City of Beverly Hills places primary importance on developing and maintaining a quality property and casualty program that thoroughly understands the risks and liabilities faced by the City as a result of the services it offers its citizens, and utilizes the best risk retention/ transfer strategy to protect the interests of the City, while still providing excellent customer service in a manner that will ensure the containment of costs, and fiscal responsibility.

The successful firm will be responsible for the marketing, evaluation, and service of the above-mentioned insurance placements on behalf of the City of Beverly Hills. They will also consult on coverage interpretation, safety/ risk reduction strategy, regulatory compliance with local, state, and national authorities, and cost recovery associated with damages to City property or claims brought against the City.

Examples of duties may include but are not limited to the following:

- ) Evaluate the City's existing insurance program, and as necessary recommend changes to terms, conditions, or coverage limits to insure the program is affordable and adequately protects the City.
- ) Evaluate the City's participation in applicable insurance pools and cost sharing programs for property, casualty and workers compensation.
- ) Work with existing underwriters to examine and implement options to shift all policies to a July 1<sup>st</sup> renewal date.
- ) Provide advice to Risk Management on ways to strengthen City loss prevention and safety programs.
- ) Assist Risk Management with excess claim submission and handling process.
- ) Maintain a user friendly electronic data base of the City's building inventory with pertinent building construction and valuation information.
- ) Inspect the City's properties every three years and update building and fine art values as appropriate.
- ) Provide Risk Management in writing, preferably by email, the broker's best estimate of the expected premium for the upcoming placement renewal by March 1<sup>st</sup> each year.
- ) Negotiate with underwriters on behalf of the City and obtain insurance coverage that best meets the City's requirements at the least cost, while also advising on the carrier's financial strength based on AM Best rating, and their claim handling practices with other similar municipalities for losses within the coverage secured.
- ) Provide Risk Management a summary of all markets approached and quotes submitted in writing, preferably email, 60 days prior to expiration of the existing insurance placement or Council Meeting that may be required to authorize binding of coverage.
- ) Bind insurance coverage before existing insurance placements expire.
- ) Verify that new policies, binders, certificates, endorsements, and other documents are accurate and reflect the terms and conditions agreed during negotiations.
- ) Respond to all insurance related questions and request for advice from Risk Management in a timely manner.
- ) Make a good faith effort to keep Risk Management informed of pertinent market developments that might affect the City's access to, or cost of, insurance prior to renewal.
- ) Assist Risk Management to coordinate inspection, audit, and other Carrier requests.
- ) Issue Certificates of Insurance as required for the City to comply with contract requirements from vendors or various government bodies.
- ) Produce loss runs for Carriers based on City maintained documents.
- ) Attend occasional meetings with City representatives, as requested.
- ) Provide legal updates and assist in maintaining compliance with all Federal and State laws and programs.

## **II. TERMS & CONDITIONS**

The City would like to enter into a contract for a term of three years, with two one year options, which may be exercised at the City's discretion. The contract to be entered into with the successful proposer will include, but not be limited to, the terms and conditions of the Professional Service Agreement. (See Attachment 1)

## **III. FORMAT AND CONTENT OF RFP**

### **Title Page**

Show the name of proposer's agency/firm, address, telephone number, and name of contact person, date and the subject: REQUEST FOR PROPOSAL FOR BROKER SERVICES' \_\_\_\_\_' (FIRM).

### **Table of Contents**

Include a clear identification of the material by section and by page number.

### **RFP Questions**

Provide answers to the RFP questions listed in Attachment 2.

### **Required Sections**

Include the following section in the format illustrated in the corresponding attachments:

- ) RFP Questions (See Attachment 2)
- ) References (See Attachment 3)
- ) Cost Proposals (See Attachment 6)
- ) Exceptions to Any Part(s) of RFP (See Attachment 7)

## **IV. SUBMISSION OF PROPOSALS**

Sealed proposals including three (3) complete copies must be received by the City Clerk's Office no later than **2pm October 19, 2017** unless time is extended by written addendum issued by the City before that date. Late proposals will not be accepted. Postmarks will not be accepted as the submitted date. Proposals shall be addressed as follows:

Bid No. 17-47  
Proposal to Provide Broker Services  
Attention: Sharon L'Heureux Dressel.  
City of Beverly Hills Office of the City Clerk  
455 North Rexford Drive, Room 290  
Beverly Hills, CA 90210

**Request for additional Information**

By submitting a proposal, the proposer agrees to furnish such additional information as the City may reasonably require. This includes information which indicates financial resources as well as the ability to provide the services. To the extent there are any revisions or additions to the information provided or requested in this RFP, an addendum will be sent to all firms who received the RFP. The City reserves the right to make such investigations of the qualifications of the proposer as it deems appropriate.

**Proposal Binding**

All proposals submitted shall be binding on proposers for one hundred twenty (120) calendar days following opening of the proposals.

**Incurred Expenses**

The City is not responsible for any cost incurred by a firm in either responding to this RFP, or in participating in oral presentation or meetings with the City.

**Proprietary Information**

In accordance with applicable Public Records Act and except as otherwise may be provided by applicable State and Federal law, all proposers should be aware that the RFP's and responses thereto are a public record. Proposals received in response to this RFP will become the property of the City and will not be returned to the proposers. In the event of contract award, all documentation produced as part of the contract will become the exclusive property of the City.

**Interviews**

The City reserves the right to interview some, all, or none of the firms responding to the RFP based solely on the City's judgment as to the firm's qualifications and capabilities.

**Acceptance/Rejection/Modifications to Proposals**

The City reserves the right to accept or reject any or all proposals, negotiate modifications to proposals that it deems acceptable, to request and consider additional information from any proposer and to waive minor irregularities and technical defects in the proposal process. The City reserves the right to seek new proposals when it determines that it is in the best interest to do so. The City also reserves the right not to pursue any specific products/services discussed in the RFP.

**Questions/Contact Person**

A bidder or potential bidder who has questions may call **Michelle Graves at (310) 285-2433 or via email at mgraves@beverlyhills.org**. All substantive questions and responses will be included as an addendum which will be updated daily on the City's website. Potential bidders that received the RFP by downloading it from the City's website or some other means should call or email Michelle to ensure that they receive any updates or answered questions. **Questions will be accepted until noon on October 9, 2017.**

## V. EVALUATION CRITERIA AND SELECTION PROCESS

### Evaluation Criteria

Proposers will be evaluated on a combination of responsiveness, organization and clarity of proposal related to the scope of work, agreement to meet the City's general terms and conditions, fees, experience, qualifications and experience of assigned personnel, and responses of references.

### Selection Process

The Review Committee may schedule interviews and/or presentations with short-listed proposers. Based on the outcome of the Review Committee's evaluation of proposals, a recommendation will be submitted to the City Council for consideration of award. An award of contract occurs when the contract is approved by the Beverly Hills City Council. Selection of a proposer with whom the City enters into contract negotiations with or a recommendation of an award by the Committee or any other party does not constitute an award of contract. The City expects, but does not guarantee, that the decision on selection of a firm will be made by the Beverly Hills City Council on the date indicated below.

Evaluations of the proposals are expected to be completed by **October 23, 2017**. The lowest price proposal will not necessarily be selected, and technical components will be weighed more heavily than costs to insure that the city is procuring best value versus lowest price. Overall responsiveness to the RFP is an important factor in the evaluation process.

Once the evaluation team has completed their review and determined the proposal with the highest overall points, the City will contact the successful Bidder on or by **October 30, 2017** (tentative).

## VI. TENTATIVE SCHEDULE

Posted Date of Proposal	October 3, 2017
Questions Due By:	October 9, 2017 by 12:00-p.m.
Proposal Due Date	October 19, 2017 by 2:00 p.m.
Selection and Notification (Tentative)	October 30, 2017
Recommendation submitted to City Council for approval (Tentative)	November 7, 2017



AGREEMENT BETWEEN THE CITY OF BEVERLY HILLS  
AND COMPANY NAME FOR INSURANCE BROKER  
CONSULTING SERVICES

THIS AGREEMENT is made by and between the City of Beverly Hills (hereinafter called "CITY"), and Company Name (hereinafter called "CONSULTANT").

RECITALS

A. CITY desires to have certain services and/or goods provided as set forth in Exhibit A (the "Scope of Work"), attached hereto and incorporated herein.

B. CONSULTANT represents that it is qualified and able to perform the Scope of Works.

NOW, THEREFORE, the parties agree as follows:

Section 1. CONSULTANT's Scope of Work. CONSULTANT shall perform the Scope of Work described in Exhibit A in a manner satisfactory to CITY and consistent with that level of care and skill ordinarily exercised by members of the profession currently practicing in the same locality under similar conditions. CITY shall have the right to order, in writing, changes in the Scope of Work. Any changes in the Scope of Work by CONSULTANT must be made in writing and approved by both parties. The cost of any change in the Scope of Work must be agreed to by both parties in writing.

Section 2. Time of Performance.

CONSULTANT shall commence its services under this Agreement upon THE Commencement Date or upon a receipt of a written notice to proceed from CITY. CONSULTANT shall complete the performance of services by the Termination Date set forth above and/or in conformance with the project timeline established by the City Manager or his designee.

The City Manager or his designee may extend the time of performance in writing for two additional one-year terms or such other term not to exceed two years from the date of termination pursuant to the same terms and conditions of this Agreement.

Section 3. Compensation.

(a) Compensation

CITY agrees to compensate CONSULTANT for the services and/or goods provides under this Agreement, and CONSULTANT agrees to accept in full satisfaction for such services, a sum not to exceed the Consideration set forth above and more particularly described in Exhibit B.

(b) Expenses

The amount set forth in paragraph (a) shall include reimbursement for all actual and necessary expenditures reasonably incurred in the performance of this Agreement (including, but not limited to, all labor, materials, delivery, tax, assembly, and installation, as applicable). There shall be no claims for additional compensation for reimbursable expenses.

(c) Additional Services. CITY may from time to time require CONSULTANT to perform additional services not included in the Scope of Services. Such requests for additional services shall be made by CITY in writing and agreed upon by both parties in writing.

Section 4. Method of Payment. CITY shall pay CONSULTANT said Consideration in accordance with the method and schedule of payment set forth in Exhibit B.

Section 5. Independent CONSULTANT. CONSULTANT is and shall at all times remain, as to CITY, a wholly independent CONSULTANT. Neither CITY nor any of its agents shall have control over the conduct of CONSULTANT or any of CONSULTANT's employees, except as herein set forth. CONSULTANT shall not, at any time, or in any manner, represent that it or any of its agents or employees are in any manner agents or employees of CITY.

Section 6. Assignment. This Agreement shall not be assigned in whole or in part, by CONSULTANT without the prior written approval of CITY. Any attempt by CONSULTANT to so assign this Agreement or any rights, duties or obligations arising hereunder shall be void and of no effect.

Section 7. Responsible Principal(s)

(a) CONSULTANT's Responsible Principal set forth above shall be principally responsible for CONSULTANT's obligations under this Agreement and shall serve as principal liaison between CITY and CONSULTANT. Designation of another Responsible by CONSULTANT shall not be made without prior written consent of CITY.

(b) CITY's Responsible Principal shall be the City Manager or his designee set forth above who shall administer the terms of the Agreement on behalf of CITY.

Section 8. Personnel. CONSULTANT represents that it has, or shall secure at its own expense, all personnel required to perform CONSULTANT's Scope of Work under this Agreement. All personnel engaged in the work shall be qualified to perform such Scope of Work.

Section 9. Permits and Licenses. CONSULTANT shall obtain and maintain during the Agreement term all necessary licenses, permits and certificates required by law for the provision of services under this Agreement, including a business license.

Section 10. Interests of CONSULTANT. CONSULTANT affirms 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 Scope of Work contemplated by this Agreement. No person having any such interest shall be employed by or be associated with CONSULTANT.

Section 11. Insurance.

(a)CONSULTANT shall at all times during the term of this Agreement carry, maintain, and keep in full force and effect, insurance as follows:

(1)A policy or policies of Comprehensive General Liability Insurance, with minimum limits of Two Million Dollars (\$2,000,000) for each occurrence, combined single limit, against any personal injury, death, loss or damage resulting from the wrongful or negligent acts by CONSULTANT.

(2)A policy or policies of Comprehensive Vehicle Liability Insurance covering personal injury and property damage, with minimum limits of One Million Dollars (\$1,000,000) per occurrence combined single limit, covering any vehicle utilized by CONSULTANT in performing the Scope of Work required by this Agreement.

(3)Workers' compensation insurance as required by the State of California.

(4)Professional Liability Insurance

A policy or policies of Professional Liability Insurance (errors and omissions) with minimum limits of Two Million Dollars (\$2,000,000) per claim and in the aggregate. Any deductibles or self-insured retentions attached to such policy or policies must be declared to and be approved by CITY. Further, CONSULTANT agrees to maintain in full force and effect such insurance for one year after performance of work under this Agreement is completed.

(b)CONSULTANT shall require each of its sub-CONSULTANTs to maintain insurance coverage which meets all of the requirements of this Agreement.

(c)The policy or polices required by this Agreement shall be issued by an insurer admitted in the State of California and with a rating of at least a A+;VII in the latest edition of Best's Insurance Guide.

(d)CONSULTANT agrees that if it does not keep the aforesaid insurance in full force and effect CITY may either immediately terminate this Agreement or, if insurance is available at a reasonable cost, CITY may take out the necessary insurance and pay, at CONSULTANT's expense, the premium thereon.

(e)At all times during the term of this Agreement, CONSULTANT shall maintain on file with the City Clerk a certificate or certificates of insurance on the form set forth in Exhibit C, attached hereto and incorporated herein, showing that the aforesaid policies are in effect in the required amounts. CONSULTANT shall, prior to commencement of work under this Agreement, file with the City Clerk such certificate or certificates. The general liability insurance shall contain an endorsement naming the CITY as an additional insured. All of the policies required under this Agreement shall contain an endorsement providing that the policies cannot be canceled or reduced except on thirty (30) days prior written notice to CITY, and specifically stating that the coverage contained in the policies affords insurance pursuant to the terms and conditions as set forth in this Agreement.

(f) The insurance provided by CONSULTANT shall be primary to any coverage available to CITY. The policies of insurance required by this Agreement shall include provisions for waiver of subrogation.

(g) Any deductibles or self-insured retentions must be declared to and approved by CITY. At the option of CITY, CONSULTANT shall either reduce or eliminate the deductibles or self-insured retentions with respect to CITY, or CONSULTANT shall procure a bond guaranteeing payment of losses and expenses.

(h) The insurance coverage amounts required under the Agreement do not limit CITY's right to recover against CONSULTANT and its insurance carriers.

Section 12. Indemnification. CONSULTANT agrees to indemnify, hold harmless and defend CITY, City Council and each member thereof, and every officer, employee and agent of CITY, from any claim, liability or financial loss (including, without limitation, attorneys fees and costs) arising from any intentional, reckless, negligent, or otherwise wrongful acts, errors or omissions of CONSULTANT or any person employed by CONSULTANT in the performance of this Agreement.

Section 13. Termination.

(a) CITY shall have the right to terminate this Agreement for any reason or for no reason upon five calendar days' written notice to CONSULTANT. CONSULTANT agrees to cease all work under this Agreement on or before the effective date of such notice.

(b) In the event of termination or cancellation of this Agreement by CITY, due to no fault or failure of performance by CONSULTANT, CONSULTANT shall be paid based on the percentage of work satisfactorily performed at the time of termination. In no event shall CONSULTANT be entitled to receive more than the amount that would be paid to CONSULTANT for the full performance of the services required by this Agreement. CONSULTANT shall have no other claim against CITY by reason of such termination, including any claim for compensation.

Section 14. CITY's Responsibility. CITY shall provide CONSULTANT with all pertinent data, documents, and other requested information as is available for the proper performance of CONSULTANT's Scope of Work.

Section 15. Information and Documents. All data, information, documents and drawings prepared for CITY and required to be furnished to CITY in connection with this Agreement shall become the property of CITY, and CITY may use all or any portion of the work submitted by CONSULTANT and compensated by CITY pursuant to this Agreement as CITY deems appropriate.

Section 16. Records and Inspections. CONSULTANT shall maintain full and accurate records with respect to all matters covered under this Agreement for a period of three years. CITY shall have access, without charge, during normal business hours to such records, and the right to examine and audit the same and to make copies and transcripts therefrom, and to inspect all program data, documents, proceedings and activities.

Section 17. Changes in the Scope of Work. CITY shall have the right to order, in writing, changes in the scope of work or the services to be performed. Any changes in the scope of work requested by CONSULTANT must be made in writing and approved by both parties.

Section 18. Notice. Any notices, bills, invoices, etc. required by this Agreement shall be deemed received on (a) the day of delivery if delivered by hand during the receiving party's regular business hours or by facsimile before or during the receiving party's regular business hours; or (b) on the second business day following deposit in the United States mail, postage prepaid to the addresses set forth above, or to such other addresses as the parties may, from time to time, designate in writing pursuant to this section.

Section 19. Attorney's Fees. In the event that either party commences any legal action or proceeding to enforce or interpret the provisions of this Agreement, the prevailing party in such action shall be entitled to reasonable attorney's fees, costs and necessary disbursements, in addition to such other relief as may be sought and awarded.

Section 20. Entire Agreement. This Agreement represents the entire integrated agreement between CITY and CONSULTANT, and supersedes all prior negotiations, representations or agreements, either written or oral. This Agreement may be amended only by a written instrument signed by both CITY and CONSULTANT.

Section 21. Exhibits; Precedence. All documents referenced as exhibits in this Agreement are hereby incorporated in this Agreement. In the event of any material discrepancy between the express provisions of this Agreement and the provisions of any document incorporated herein by reference, the provisions of this Agreement shall prevail.

Section 22. Governing Law. The interpretation and implementation of this Agreement shall be governed by the domestic law of the State of California.

Section 23. CITY Not Obligated to Third Parties. CITY shall not be obligated or liable under this Agreement to any party other than CONSULTANT.

Section 24. Severability. Invalidation of any provision contained herein or the application thereof to any person or entity by judgment or court order shall in no way affect any of the other covenants, conditions, restrictions, or provisions hereof, or the application thereof to any other person or entity, and the same shall remain in full force and effect.

EXECUTED the \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_, at Beverly Hills, California.

CITY OF BEVERLY HILLS  
A Municipal Corporation

\_\_\_\_\_  
MAHDI ALUZRI  
City Manager

CONSULTANT:

---

CONSULTANT NAME

Title

---

CONSULTANT NAME

Title

APPROVED AS TO CONTENT:

---

DON RHOADS

Director of Administrative Services/  
Chief Financial Officer

---

SHARON L'HEUREUX DRESSEL

Interim Risk Manager

EXHIBIT A  
SCOPE OF WORK

CONSULTANT shall perform the following services:

Describe the services in detail. Include schedule for deliverables and/or services

EXHIBIT B

SCHEDULE OF PAYMENT AND RATES

Tie amount to deliverables/services, if applicable

EXHIBIT C

CERTIFICATE OF INSURANCE

This is to certify that the following endorsement is part of the policy(ies) described below:

NAMED INSURED

COMPANIES AFFORDING COVERAGE

A.

B.

ADDRESS

C.

COMPANY (A. B. C.)	COVERAGE	POLICY NUMBER	EXPIRATION DATE	B.I.	<u>LIMITS</u> P.D.	AGGREGATE
	<input type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> GENERAL LIABILITY <input type="checkbox"/> PRODUCTS/COMPLETED OPERATIONS <input type="checkbox"/> BLANKET CONTRACTUAL <input type="checkbox"/> CONSULTANT'S PROTECTIVE <input type="checkbox"/> PERSONAL INJURY <input type="checkbox"/> EXCESS LIABILITY <input type="checkbox"/> WORKERS' COMPENSATION <input type="checkbox"/>					

It is hereby understood and agreed that the City of Beverly Hills, its City Council and each member thereof and every officer and employee of the City shall be named as joint and several assureds with respect to claims arising out of the following project or agreement:

It is further agreed that the following indemnity agreement between the City of Beverly Hills and the named insured is covered under the policy: CONSULTANT agrees to indemnify, hold harmless and defend City, its City Council and each member thereof and every officer and employee of City from any and all liability or financial loss resulting from any suits, claims, losses or actions brought against and from all costs and expenses of litigation brought against City, its City Council and each member thereof and any officer or employee of City which results directly or indirectly from the wrongful or negligent actions of CONSULTANT's officers, employees, agents or others employed by CONSULTANT while engaged by CONSULTANT in the (performance of this agreement) construction of this project.

It is further agreed that the inclusion of more than one assured shall not operate to increase the limit of the company's liability and that insurer waives any right of contribution with insurance which may be available to the City of Beverly Hills.

In the event of cancellation or material change in the above coverage, the company will give 30 days written notice of cancellation or material change to the certificate holder.

Except to certify that the policy(ies) described above have the above endorsement attached, this certificate or verification of insurance is not an insurance policy and does not amend, extend or alter the coverage afforded by the policies listed herein. Notwithstanding any requirement, term, or condition of any contract or other document with respect to which this certificate or verification of insurance may be issued or may pertain, the insurance afforded by the policies described herein is subject to all the terms, exclusions and conditions of such policies.

DATE:

\_\_\_\_\_

BY:

\_\_\_\_\_  
Authorized Insurance Representative

TITLE:

\_\_\_\_\_

AGENCY:

\_\_\_\_\_

ADDRESS:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

RM02.DOC REVISED 10/14/96.

## **ATTACHMENT 2 RFP QUESTIONS**

### **1. Insurance Procurement Approach:**

Concisely describe how your firm would structure, market, and negotiate the terms and conditions of the City's property insurance program to ensure the City received the broadest range of high quality insurance coverage at the best possible cost. Explain why your approach will yield better results than your competitors.

### **2. Insurance Consulting Services**

Describe consulting services (e.g., assistance with loss control, coverage decisions, insurance questions, policy interpretations, claim submissions, etc.). Include information on any unique services your firm can offer the City that will distinguish you from other RFP respondents.

### **3. Valuation and Building Inventory:**

Describe your firm's ability to provide building valuation services (at least once every three years) and maintain an electronic data base of the City's building inventory with pertinent building construction and valuation information.

### **4. Key Personnel**

Identify all personnel to be assigned to the account and designate the individual who will serve as account manager. Describe the qualifications of each account member, including their job titles, experience, professional qualifications, and certifications. Include a professional resume for each account member.

### **5. References**

Provide the names and telephone numbers of three current public agency clients with property insurance programs similar to the City of Beverly Hills and one public agency client you have lost in the past two years.

### **6. Project Work Plan**

Describe your approach to accomplishing the scope of services. Include deliverables, milestones, assumptions, and identify potential risks that could delay the project. List any resources you expect the City to provide.

### **7. Cost Proposal**

The City seeks an all-inclusive fixed price fee for each year of the five year contract. Identify the desired fee and payment schedule by year. Additionally, describe how any commissions would be disclosed and credited toward the annual fixed price fee.

## **8. Disclosure**

Disclose all sources of income resulting from the marketing of the City's property insurance program.

## **9. Company**

1. Describe your company's history, ownership and organizational structure.
2. List your company's affiliates, subsidiaries and/or parent companies.
3. Provide a statement of your company's alcohol, substance abuse and firearms policy.
4. Provide, in detail, your company's hiring standards (include background checks, drug testing, etc.).
5. Provide detailed information about any lawsuits, liens, restraining orders, foreclosures, or other legal/financial actions pending, in progress, or which have been brought against your company in the last five years.
6. Provide copies of all licenses, permits and registrations required by federal, state, local regulations, rules and statutes.
7. Provide Evidence of Insurance Coverage including General, Auto, Professional Liability, and Workers Compensation.
8. Provide three references of clients that are using your services, similar in scope to what the City of Beverly Hills is requesting in this RFP. (See Attachment 3)

**ATTACHMENT 3  
REFERENCES**

<b>No.</b>	<b>Company Information</b>	<b>Years of Service Provided</b>
1	Company Name: Address:  Contact Name: Contact Phone Number:	
2	Company Name: Address:  Contact Name: Contact Phone Number:	
3	Company Name: Address:  Contact Name: Contact Phone Number:	

**Note: Provide at least 3 references. Public agency references preferred. If contact person is no longer with company/agency, please indicate.**

**ATTACHMENT 4  
CITY HOLIDAY CLOSURES**

<b>Holiday Description</b>	<b>Date(s) or Day(s) Closed</b>
New Year's Day	January 1 <sup>st</sup>
Martin Luther King Day	3 <sup>rd</sup> Monday in January
Lincoln's Birthday	February 12 <sup>th</sup>
President's Day	3 <sup>rd</sup> Monday in February
Memorial Day	Last Monday in May
Independence Day	July 4 <sup>th</sup>
Labor Day	1 <sup>st</sup> Monday in September
Veteran's Day	2 <sup>nd</sup> Thursday in November
Thanksgiving	4 <sup>th</sup> Thursday and Friday in November
Christmas Day	December 25 <sup>th</sup>

**Note: If a holiday falls on Saturday, then Friday is the observed holiday; if a holiday falls on a Sunday, then Monday is the observed holiday.**

**ATTACHMENT 5  
CURRENT INSURANCE PLACEMENT:**

**Commercial Crime**

**Limits:** \$5,000,000

**Carrier:** National Union Fire Insurance Company

**Policy Period:** 01/07/2017 to 01/07/2018

**Travel Accident**

**Limits:** \$150,000

**Carrier:** Hartford Life & Accident

**Policy Period:** 02/28/2015 to 02/28/2018

**First Excess Municipal Liability Policy (includes General Liability, Errors & Omissions, Employment Practices Liability and Employee Benefits Liability)**

**Limits:** \$10,000,000 Excess of \$1,500,000 SIR

**Carrier:** Allied World Insurance Company

**Policy Period:** 03/01/2017 to 03/01/2018

*Includes Terrorism*

**Second Excess Municipal Liability Policy (includes General Liability, Errors & Omissions, Employment Practices Liability and Employee Benefits Liability)**

**Limits:** \$10,000,000 Excess of \$10,000,000 Excess of \$1,500,000 SIR

**Carrier:** Allied World National Assurance Company

**Policy Period:** 03/01/2017 to 03/01/2018

*Includes Terrorism*

**Third Excess Municipal Liability Policy (includes General Liability, Errors & Omissions, Employment Practices Liability and Employee Benefits Liability)**

**Limits:** \$20,000,000 Excess of \$10,000,000 x \$10,000,000 Excess of \$1,500,000 SIR

**Carrier:** Navigators Specialty Ins. Co. / Endurance American Specialty

**Policy Period:** 03/01/2017 to 03/01/2018

*Includes Terrorism*

**Commercial Property**

**Blanket Limit:** \$461,759,747 (all covered locations)

**Carrier:** Affiliated FM Insurance Company

**Policy Period:** 07/01/2017 to 07/01/2018

*Includes Terrorism*

**Difference In Conditions (including Earthquake & Flood) - Excluding Underground Parking Structure**

**First Layer:** \$100,000,000

**Second Layer:** \$214,872,752 Excess \$100,000,000

**Carriers:** Various - Lead carriers are Lexington Insurance Co. & National Fire & Marine Insurance Co.

**Policy Period:** 07/01/2017 to 07/01/2018

**Difference In Conditions (including Earthquake & Flood) - Underground Parking Structure**

**Covered Location:** 455 N. Crescent Dr., Beverly Hills, CA 902120

**Total Limits:** \$47,400,000

**Carriers:** Various - Lead carries are Everest Indemnity & General Security Indemnity

**Policy Period:** 11/01/2017 to 11/01/2018

**General Liability for Special Events-Tenants & Permittees of the City of Beverly Hills**

**Limits:** \$1,000,000

**Policy Period:** 09/12/17 to 09/12/18

**Public Officials Bond**

**Bond Amount:** \$25,000

**Surety:** CNA Insurance Company

**Bond Period:** 05/05/2017 to 05/15/2020

**Underwriting Criteria:**

Summary for Calendar Year ended 2016		
Department	Entire Dept	Only Sworn Police/Fire Safety Personnel
Police	\$ 26,229,321.31	\$ 18,605,721.82
Fire	\$ 16,831,189.19	\$ 15,751,380.88
Water Dept.	\$ 3,142,423.52	
Total Payroll (not including payoffs)	\$ 85,598,168.89	

<b>XS Liability</b>	Loss Runs available for Review upon signing of Broker of Record Letter
<b>Work Comp</b>	Loss Runs available for Review from TPA upon signing of Broker of Record Letter
<b>Other Coverages</b>	Available for review and evaluation upon signing of Broker of Record Letter

**ATTACHMENT 6-  
COST PROPOSAL**

