



REQUEST FOR PROPOSAL (RFP)

Agent of Record

for

**Property, General Liability, and Worker's Compensation
Insurance**

Due Date — 1:00 PM, Wednesday, September 22, 2023

INQUIRIES AND PROPOSALS SHOULD BE DIRECTED TO:

Mark R. Morgan— Town Manager

Town of Danville

49 North Wayne Street,

Danville, IN 46122

Phone: 317-745-4180 ext. 1001

The Town of Danville is an Equal Opportunity Employer

A great place to spend an hour or a Lifetime.

Send your completed proposal to The Town of Danville
49 N Wayne Street, Danville, IN 46122
[e-mail: mmorgan@danvillein.gov](mailto:mmorgan@danvillein.gov)

Town of Danville - Request for Proposal

Insurance agent of Record for property, casualty, and workers compensation

To: Interested Insurance Agents

Date: September 6, 2023

From: Mark R. Morgan

Subject: Request for Proposal

Your firm is invited to submit information for providing services for acquiring property, casualty, and workers compensation insurance for the Town of Danville, Indiana.

Attached to this memo are the following:

- a) Scope of Services
- b) Agent Selection Questionnaire

Seven (7) copies (10 pages maximum) of your responses to the Agent Selection Questionnaire must be mailed or delivered to:

Town of Danville
Attn: Mark Morgan
49 N. Wayne St
Danville, Indiana 46122
mmorgan@danvillein.gov

Deadline for submission is 1:00 PM on 9/22/23.

Thank you for your interest.

The Town of Danville is issuing a Request for Qualifications for the purpose of evaluating professional services relating to the coverages and protections available in the insurance market. THIS IS NOT A REQUEST FOR PROPOSALS OR QUOTES. Town of Danville is reviewing our current insurance service agreement, and lines of coverage to ensure adequacy for the risk we face as a municipality. Specifically, we're reviewing our General Liability, Casualty, Auto, Workers Compensation and Professional Liability lines with coverages as outlined below:

General Liability
Automobile Liability
Umbrella Liability
Workers Compensation and
Employers' Liability
Public Officials Liability
Employment Practices Liability
Law Enforcement Liability

Please provide answers to the following. We ask that proposals are professional but focus on value offered. Where possible, please do not exert extra time on heavy marketing.

1. Briefly describe your firm's history and background.
2. How many municipal entity clients does your agency handle?
3. What levels of service do you provide when managing the Insurance needs of your clients?
 - a. Explain the services, expertise and resources available to your insurance clients.
 - b. What are your risk management capabilities?
4. What size clients does your firm generally support?
5. Describe your service philosophy and the approach taken in working with your client throughout the year. What does your agency consider as the most important factors in working with an insurance carrier when designing coverage and selecting an insurance partner for your clients?
6. Describe what makes your firm uniquely qualified to work on our account.
7. Provide an example of how your firm is taking a leadership role within the industry as well as an expertise around servicing public entities?
8. What is your client retention percentage for the last 5 years? Why do clients leave your organization?
9. Describe the proposed team that would work with Town of Danville and provide information about the qualifications, number of clients managed and expertise of each team member, experience with various G/L, Auto, P/L lines of coverage.
 - a. Please elaborate regarding the team: Names, job descriptions and level of experience would be appreciated.
 - b. Describe the structure of the team that would be assigned to our program.
 - c. Why would you be the perfect partner for our company?
 - d. How do you ensure customer satisfaction?
11. How can you help us develop cost projections tied to our town's goals? What resources will you bring to bear to assist in maximizing the cost efficiencies of the placement of insurance coverage and services? Are there organic resources?

12. How will you help us with the competitive marking and placement of our plans, including development of marketing specifications, identification of market conditions, evaluation of proposals, negotiations, and placement of insurance contracts for annual renewals?

13. In an ideal world, what creative approaches and techniques would you recommend for us to generate significant savings over the next 5 years? What tools would you use to help develop and sustain a long-term strategic plan.

14. Provide a Certificate of Insurance outlining your company's Errors and Omissions insurance coverage.

15. What is the fee that you're proposing for this service?

16. How are your fees calculated? Is it a commission based or flat fee model? Is a contract required?

17. Do you have a relationship with Great American Insurance Company and if so, how would you describe it?

18. Provide three references from current clients, preferably of similar size and/or needs and complexity to Town of Danville. For each reference please include:

- a. Number of employees
- b. Length of servicing relationship
- c. Contact name, title, and phone number

Selection Criteria:

Finalists will be selected based on, but not limited to, the following criteria:

1. Quality and level of expertise and experience.
2. Level of experience of firm and staff involved in the day-to-day servicing of our account.
3. Demonstrates the ability to maintain responsive and timely service.
4. Ability to share benchmarking data related to the municipal space.
5. The flexibility to facilitate anticipated and unanticipated future process changes.
6. Positive reference checks and demonstrating success with similar clients.

| Timeline | Activity | Date |
|-----------------|--------------------------|--------------------|
| | RFP Distribution | September 6, 2023 |
| | RFP Response Due | September 22, 2023 |
| | Proposal Review | September 25, 2023 |
| | Council Presentation | October 4, 2023 |
| | Select Broker/Consultant | October 18, 2023 |

Agents that complete all documents and timelines will be asked to appear before the Danville Town Council on October 4, 2023. Times will be announced once all applications are received. Each applicant will be given approximately 10 minutes to make their presentation. Council reserves the right to ask questions during the process. Applicants will be notified when the Council makes a choice of Agent of Record.