

**COUNTY OF TANEY,  
MISSOURI**



**REQUEST FOR QUALIFICATIONS**

**For**

**INSURANCE BROKER of RECORD  
(Property & Liability)**

**RFQ #201204-176 Insurance Broker of Record**

**Release Date:**

April 11, 2012

**Submittal Deadline:**

April 23, 2012

Not later than 9:30 AM, Central Time

Taney County Purchasing  
132 David Street  
P.O. Box 1630  
Forsyth, Missouri 65653

Ron Erickson, Director of Purchasing  
Phone: 417-546-7281 Fax: 417-546-3931  
E-mail: [rone@co.taney.mo.us](mailto:rone@co.taney.mo.us)

**RFQ #201204-176 Insurance Broker of Record  
Taney County, Missouri**

**INSURANCE BROKER of RECORD - PROPERTY & LIABILITY**

**OVERVIEW**

The Taney County Commission is requesting qualifications (RFQ) from firms to provide professional Insurance Brokerage (Agent) Services for Taney County Missouri. It is the intention of the Taney County Commission to appoint an Agent of Record for a period of one year with possible renewal options. The successful firm must be a licensed Missouri insurance producer, must have a minimum of five (5) years of experience representing medium to large sized groups, and must have access to various competitive insurance markets.

**INVITATION / PURPOSE**

Qualifications are now being accepted by the Taney County Commission for a professional insurance broker (Broker) to represent Taney County Missouri in various commercial insurance markets including but not limited to property, casualty, liability, auto, and other required areas. The company will be a qualified Broker in the public entity market and will serve as Broker of Record for the specified policies. **Taney County is NOT requesting insurance quotations at this time and expressly prohibits prospective brokers from quoting or approaching carriers at this time.**

**TERM OF CONTRACT**

This professional services contract will commence on, or about, July 1, 2012, and extend for an initial period of one year. Taney County shall have the option of renewing the relationship for up to two additional one year terms. Notice by Taney County to renew will be made at least sixty (60) days prior to normal contract expiration.

Firms wishing to submit a proposal must be:

- 1) Duly authorized to conduct business in the State of Missouri.
- 2) Professionally registered in the State of Missouri.
- 3) Able to commit adequate staff to meet the desired time frames.

Interested firms should submit four (4) copies of their written Statement of Qualifications in a sealed envelope, or package with **RFQ #201204-176** clearly marked on it, mail or hand delivered to:

Taney County Purchasing Department  
Ron Erickson, Director of Purchasing  
132 David Street / PO Box 1630  
Forsyth, Missouri 65653

**Not later than 9:30 AM, Central Time April 23, 2012**

**RFQ #201204-176 Insurance Broker of Record  
Taney County, Missouri**

**SCOPE OF WORK**

- Perform services necessary to replace insurance coverage expiring on, or about, June 30, 2012.
- Possess an understanding of Taney County's needs in specialized areas and provide input to management as to areas of modification or improvement.
- Provide safety / loss control services and documentation as requested.
- Perform other services customarily expected of a broker for the duration of the agreement.
- Act as the liaison and advocate for the Taney County Commission with underwriters and claims staff.
- Provide all carrier quotations received from carrier underwriters with detailed recommendations to the Taney County Commission of which proposal would best meet the County's needs.
- Verify the accuracy and adequacy of policies, endorsements, coverage, and premiums, noting in writing any variations from the previous year, or from conformance with specifications.
- Assist in determining proper limits and coverage for exposures specific to Taney County.
- Assess insurance company stability, solvency and service records.
- Deliver insurance policies or binders during term of coverage.
- Accurately amend policies, as needed.
- Upon request, provide timely, verbal or written interpretation of coverage.
- Provide policy maintenance and issue binders and certificates when required.
- Assist the Taney County Commission in developing insurable values for all real and personal property. Brokers' recommendations to purchase insurance shall be made in writing and shall be sufficiently detailed to explain alternatives and support the recommended decision.
- Broker shall provide full disclosure of fees, commissions, and income to be derived from services to Taney County.
- Such disclosure shall also include payment terms and expectations of Broker.
- Brokers are encouraged to suggest alternative methods of compensation and billing that will result in cost savings for Taney County, particularly if they also maintain or improve broker services.
- In addition to insurance brokerage services, Taney County requires their broker to perform the following services as part of their proposal :
  - a. Processing of enrollment and change forms;
  - b. Employee training and customer service;

***SELECTION PROCEDURE***

The Taney County Commission reserves the right to reject any or all responses, when such rejection is in the best interest of the County.

Selection will be based on the items listed above, but not limited to. Information received will be reviewed by the Taney County Commission after all have been opened and read aloud (Company / Firm Name only) by the Director of Purchasing at **9:30 AM on Monday April 23, 2012**. The Commission plans to make a final selection as soon as possible after opening and reviewing.