

# TANEY COUNTY

*REQUEST FOR QUALIFICATIONS # 201505-303*



## INSURANCE BROKER OF RECORD

(Independent Insurance and Benefits Services)

Bid Schedule / Deadlines:

May 2 - June 1, 2015

May 21, 2015 at 1:00 P.M.

**June 1, 2015 at 9:00 AM.**

**June 1, 2015 at 9:45 A.M.**

Bid Release Date / Advertising Period.

Deadline for Submitting Questions.

**Closing Date / Time.**

**Opening Date / Time.**

Attn: **Ron Erickson, Director of Purchasing**

Phone: 417-546-7281 / FAX: 417-546-3931

[rone@co.taney.mo.us](mailto:rone@co.taney.mo.us)

## INSURANCE BROKER of RECORD – Independent Insurance and Benefits

### 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 for review by the Taney County Commission for a professional insurance broker (Agent of Record) to represent Taney County Missouri in various commercial insurance markets including, but not limited to, health insurance benefits for approx. 255 Taney County Employees, as well as other required areas not specifically listed here.

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/approaching carriers at this time.

### QUESTIONS / ANSWERS PROCESS

- ANY / ALL questions shall be submitted prior to the RFQ opening and no later than 1:00 P.M. Thursday May 21, 2015. Questions must be emailed to; [rone@co.taney.mo.us](mailto:rone@co.taney.mo.us).
- All questions will be answered in written addendum form and emailed to all parties who had previously been part of the original DBI (Direct Bid Invitation email), or had made email contact during the open questioning timeframe. One addendum email will be sent as close as possible to the day following the deadline listed above. Same addendum will also be posted on the Taney County website.

### TERM OF CONTRACT

This professional services contract will commence on, or about, a date to be determined by the Taney County Commission after Vendor selection, 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 RESPONSE 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.
4. Familiar with Taney County Missouri. (Posses local knowledge.)

Qualified firms should submit four (4) copies of their written Statement of Qualifications in a single sealed envelope, or package with RFQ #201505-303 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 9:00 AM, Central Time June 1, 2015

## SCOPE OF WORK

- 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 the best employee benefits options, and adjustments, based on claim history monitoring, etc.
- 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.
  - c. Wellness events / programs.

## 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, but not limited to, the items listed above. Information received will be reviewed by the Taney County Commission after all responses have been opened and read aloud (Company / Firm Name only) by the Director of Purchasing at 9:45 AM on Monday June 1, 2015. The Commission plans to make a final selection after a complete and thorough review process and will notify said firm at the appropriate timeframe best meeting the needs of Taney County.