

# WAUKEGAN PORT DISTRICT

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AIRPORT . MARINA . PORT

## Request for Qualifications (RFQ) Insurance Broker Services Property and Casualty Waukegan Port District - Illinois

### GENERAL INFORMATION/PUBLISHING

The Waukegan Port District of Illinois is accepting "Qualification Statements" (qualifications) from licensed Insurance Brokers and/or Agents for the purpose of providing independent, professional insurance brokerage services for the District's Property and Casualty Insurance Program. Properties include the harbor, port and airport.

The Broker/Agent must have a proven track record of successfully providing property and casualty insurance for units of local government of comparable size and complexity and will work directly with the Waukegan Port District Board in reviewing, structuring, selecting and implementing the District's property and casualty insurance program.

The policy period year for the property and casualty insurance program begins January 31. This RFQ is being done with the objective of evaluating a Broker/Agent relationship relative to other interested parties and their ability to provide property and casualty insurance. The anticipated duration for the initial Broker/Agent services is for a period of three (3) years. The duration may be reviewed from year to year at the District's sole discretion, and the District may further extend the relationship on an annual basis.

The Broker/Agent relationship is expected to commence following the RFQ selection process and award of broker of record, for the 2023 - 2024 policy period. The final selection is subject to approval by the District's Board.

### Scope of Work

The Waukegan Port District is seeking an experienced, responsible, capable and professional firm to serve as a broker for the District's property and casualty insurance programs for the District's upcoming 2023 renewal. The selected broker/consultant will work directly with the General Managers of the Harbor/Marina and Airport respectively on all renewal strategies and placements for the District's property and casualty insurance program including but not limited to liability, auto, property, crime, and cyber coverage. The successful firm will assume responsibility for developing high quality marketing materials to present the District program exposures and comprehensive risk management programs to commercial insurance underwriters for current and future insurance placements. The selected broker will provide services that will guarantee high-quality insurance coverage for the Port District.

services to reduce the District's overall exposures, while employing a reasonable level of fiscal responsibility. Proposals will be evaluated to ascertain which proposer best meets the current and future needs of the District.

The successful firm shall be responsible for the comprehensive marketing, evaluation, and service of the insurance placements listed below. The successful firm will also consult on coverage interpretation, cost containment strategies, safety/risk reduction strategies, regulatory compliance with local, state, and national authorities, and cost recovery (subrogation) associated with damages to District property or claims brought against the District.

Coverage:

Property (first-party), including flood	Public Officials Liability
Inland Marine	Airport Liability
General Liability	Crime & Fidelity
Automobile Liability	Cyber Liability
Auto Physical Damage	Pollution/Underground Storage Tank

#### **RFQ QUESTIONS AND CLARIFICATIONS**

All inquiries regarding the RFQ must be submitted in writing to the WPD Board Liaison:

Khalilah Brown

**Email: [kbrown@waukeganport.com](mailto:kbrown@waukeganport.com)**

#### **ANTICIPATED TIME LINE**

Advertise RFQ: November 30, 2022

Open sealed RFQ Response: December 11, 2022

Oral Interviews: December 12-19, 2022

RFQ Award (Board Meeting): December 21, 2022

Timeline is subject to change at the sole discretion of District. No individual extensions will be granted for the RFQ deadline.

#### **ADDITIONAL SUBMITTAL AND RFQ DETAILS**

1. The RFQ Response must be delivered and received by the District no later than December 11, 2022.
2. The RFQ Response must be submitted to: Waukegan Port District,  
Attn: Khalilah Brown  
WPD Board Liaison  
[kbrown@waukeganport.com](mailto:kbrown@waukeganport.com)  
55 South Harbor Place  
Waukegan, IL 60085-5619
3. Respondents must submit an email copy of the RFQ Response. All materials and exhibits shall be enclosed included with the name of the Broker/Agent clearly identified and "PROPERTY AND CASUALTY BROKER RFQ" clearly marked in the subject heading of the email.
4. Documents received after the deadline will not be considered

5. False statements and/or incomplete submittals are grounds for rejection.
6. Please note that all information received in this process becomes property of Waukegan Port District and is public information after the selection process is completed (subject to disclosure in accordance with the Open Records Act).
7. District reserves the right to amend this RFQ up to the deadline. Notification of any amendments will be posted to the District's website and will be distributed via email to all parties who have requested same by providing a valid email address. In the event such an amendment would require significant changes in the scope of work, The District reserves the right to adjust the deadline accordingly to allow respondents to revise their responses.
8. The District reserves the right to: request additional information from any or all parties at any point in the process, waive any irregularities in any response, cancel this RFQ in whole or part, reject any or all proposals, and/or proceed at any time with the Broker determined to be the best suited for providing property and casualty insurance as outlined.
9. Prior to the submittal deadline, RFQ Responses may be modified or withdrawn by the respondent's authorized representative in writing. If proposals are modified or withdrawn, the authorized representative shall make his identity and general reason known.11. It is the Broker's responsibility to carefully examine all components of the RFQ, his/her ability to meet the expectations outlined, and to respond accordingly. Failure to do so shall not be grounds for any declaration that the respondent did not understand the conditions and requirements of the RFQ.
10. From the date of distribution of the RFQ through the date of selection of a Broker by the WPD Board, Broker may not initiate or continue any verbal or written communications regarding this RFQ with any district's board, employees or other district representative other than the individual listed in the document for inquiries. Such communications are expressly forbidden except with the written knowledge to and permission of the District's Chairman. Violations will be reviewed by the District's Chairman. If determined that such communication has compromised the competitive process or is otherwise deemed to be disruptive, inappropriate, or unacceptable conduct, the RFQ submitted by the Broker may be disqualified from further consideration.
11. Failure to observe any of the instructions or conditions in this RFQ may constitute grounds for rejection of the Broker's RFQ Response.

## **REFERENCES**

1. Provide information regarding the history and organization of your firm. Include your main businesses, number of employees, offices and locations, as well as financial information.
2. Name the Principal and other key personnel, including title and area of expertise, who will be fully responsible for the District's account. Provide resumes and professional qualification and related educational background of the personnel assigned to the account. Please describe duties, responsibilities, relevant expertise pertaining to our insurance program, and relevant rewards, certificates and other achievements of each individual.

3. Total number of districts, villages, cities, or towns your firm currently handles property and casualty insurance brokerage services for in Illinois.
4. Provide evidence of the firm's experience in providing service for others insured with coverage or programs comparable to the District's, as well as, a description of any underwriting procedures or special plans which have been used to serve other accounts.
5. What is your agency's estimated total premium volume for all clients?
6. How many municipal clients does your firm currently handle with our current insurance carriers?
7. Describe the range of the claims management services provided by the servicing office and your firm and your experience working with third party claims administration firms.
8. Describe your conceptual plan for the District's Risk Management Program. Include the general coverage terms, exclusions, market capacity and constraints, risk retention or self- insurance levels, approximate premiums, retrospective rating plans and deductibles.
9. List all cost of the Broker services including Commission received from the placing of the District's insurance plans
10. Describe safety programs, loss control, training, and other technical services/resources available from your firm and the servicing office.
11. What other services does your firm provide that you believe sets you apart from other insurance brokerage firms.
12. Provide a minimum of (5) municipalities serviced by your firm.
13. Provide contact info for a key reference from the municipalities.