



## Finance Department

Robert Daddario  
Finance Director

## MEMORANDUM

To: Rafael G. Casals, Town Manager

From: Selection Committee Members:  
Robert Daddario, Finance Director (Chair)  
Kathryn Lyon, Planning & Zoning Director  
Alfredo Quintero, Public Works Director

Date: July 22, 2015

Re: Award Recommendation, RFP #15-10, Property, Liability & Casualty Insurance

The Town of Cutler Bay (the "Town") received RFP responses for RFP #15-10 from two bidders prior to the response deadline of 2pm on Friday, July 17, 2015. After the deadline past, the sealed bids were then opened by the Interim Town Clerk. One was received from the Florida League of Cities (the "FLC") on behalf of the Florida Municipal Insurance Trust (the Town's current insurer) and one was received from Brown & Brown Insurance.

Upon review of the contents of the packages opened by the Interim Town Clerk, she noted that the bid response from Brown & Brown Insurance did **not** include the required Appendices (A, B & C). This was duly noted by the Interim Town Clerk on the "Bid Contents Summary" form. Given that these were required forms to be included in the RFP responses, it was decided to consult with the Town Attorney if this omission was of a type that the Town Manager had authority to waive.

On Monday, July 20, 2015, the Town Attorney completed his review and concluded that this omission resulted in the bid proposal from Brown & Brown Insurance being "non-responsive" and directed the Town Staff to reject their bid response. As a result, the Selection Committee did not consider or evaluate the bid response from Brown & Brown Insurance.

On July 22, 2015 at 10am, the Selection Committee Members met to discuss the bid responses to RFP #15-10. As the response from Brown & Brown Insurance was rejected, as noted above, the evaluation focused on the bid response from the FLC. The Selection



Committee concluded that the bid response from the FLC met the RFP criteria. The Selection committee scores were as follows:

<b>Proposer</b>	<b>Robert Daddario</b>	<b>Kathryn Lyon</b>	<b>Alfredo Quintero</b>	<b>Total Points</b>	<b>Average Points</b>
Florida League of Cities	88	94	91	273	91
Brown & Brown	N/A*	N/A*	N/A*	N/A*	N/A*

\*- as discussed above, bid response was rejected and not evaluated at direction of Town Attorney

Based on the foregoing, the Selection Committee recommends that the Town Manager accept the bid response of FLC and award RFP #15-10 to them.

Attached please find for your review:

1. Exhibit A - copies of the evaluation sheets for each Selection Committee Member, and
2. Exhibit B – copy of e-mail correspondence from the Town Attorney directing Town Staff to reject the bid response from Brown & Brown as it was determined to be non-responsive.





**Town of Cutler Bay**

10720 Caribbean Blvd., Suite 105  
 Cutler Bay, Florida 33189  
 Phone: (305) 234-4262 Fax: (305) 234-4251  
 Website: [www.cutlerbay-fl.gov](http://www.cutlerbay-fl.gov)

Bidder's Name: Florida League of Cities  
 Committee Member: Robert Daddario

**RFP #15-10  
 PROPERTY, LIABILITY AND CASUALTY INSURANCE**

Evaluation Criteria

CATEGORIES	MAX POINTS	AWARDED POINTS
TOTAL PRICING (PREMIUMS COMBINED FOR ALL LINES)	45	42
QUALIFICATIONS, EXPERIENCE AND FINANCIAL STRENGTH	20	17
PLANS/SERVICES	20	15
OTHER SERVICES AND BENEFITS	10	10
RESPONSE COMPLIANCE WITH RFP REQUIREMENTS	5	4
<b>TOTAL POINTS</b>	<b>100</b>	<b>88</b>

Additional Notes:



**Town of Cutler Bay**

10720 Caribbean Blvd., Suite 105  
 Cutler Bay, Florida 33189  
 Phone: (305) 234-4262 Fax: (305) 234-4251  
 Website: [www.cutlerbay-fl.gov](http://www.cutlerbay-fl.gov)

Exhibit A  
 PAGE 2 of 3

Bidder's Name: Florida League of Cities

Committee Member: K. LYON

RFP #15-10

PROPERTY, LIABILITY AND CASUALTY INSURANCE

Evaluation Criteria

CATEGORIES	MAX POINTS	AWARDED POINTS
TOTAL PRICING (PREMIUMS COMBINED FOR ALL LINES)	45	45
QUALIFICATIONS, EXPERIENCE AND FINANCIAL STRENGTH	20	18
PLANS/SERVICES	20	18
OTHER SERVICES AND BENEFITS	10	9
RESPONSE COMPLIANCE WITH RFP REQUIREMENTS	5	4
<b>TOTAL POINTS</b>	<b>100</b>	<b>94</b>

Additional Notes:

Tab 4 Did not see description of claims process to be utilized - Tab 6  
 Tab 5 9 bios - not sure who will be handling Cutler Bay - Jim &  
 Tab 6 very short  
 Tab 8 no administrative action SV  
 Tab 9 insufficient  
 Tab 11 Appendix B missing  
 Dorothy



**Town of Cutler Bay**

10720 Caribbean Blvd., Suite 105  
Cutler Bay, Florida 33189  
Phone: (305) 234-4262 Fax: (305) 234-4251  
Website: [www.cutlerbay-fl.gov](http://www.cutlerbay-fl.gov)

Exhibit A  
PAGE 3 of 3

Bidder's Name: FLORIDA LEAGUE OF CITIES INC

Committee Member: ALFREDO QUINTERO

RFP #15-10  
PROPERTY, LIABILITY AND CASUALTY INSURANCE

Evaluation Criteria

CATEGORIES	MAX POINTS	AWARDED POINTS
TOTAL PRICING (PREMIUMS COMBINED FOR ALL LINES)	45	45
QUALIFICATIONS, EXPERIENCE AND FINANCIAL STRENGTH	20	20
PLANS/SERVICES	20	15
OTHER SERVICES AND BENEFITS	10	9
RESPONSE COMPLIANCE WITH RFP REQUIREMENTS	5	2
<b>TOTAL POINTS</b>	<b>100</b>	<b>91</b>

Additional Notes:

NO PAGE NUMBERS ON TABS 2 AND PAGES NOT NUMBERED, 9 KEY STAFF BIOGRAPHIES PROVIDED IN 3 PAGES INSTEAD OF 4 ONE PAGE RESUMES. NO LIMIT PROVIDED FOR TAB 7 REFERENCES. ONLY 1 PAGE PROVIDED IN TAB 6 FOR FUNDS/SERVICES WHICH IS A WORK DESCRIPTION.

Exhibit B  
PAGE 1 of 4

**Robert Daddario**

---

**From:** Rafael Casals  
**Sent:** Monday, July 20, 2015 3:55 PM  
**To:** Robert Daddario; Kathryn Lyon; Alfredo Quintero  
**Cc:** Jacqueline Wilson; Jazmin Gonzalez  
**Subject:** FW: Insurance RFP

Dear Selection Committee Members:

Please find below direction from the Town Attorney's Office.

Thanks,

Rafael Casals, CFM  
Town Manager

Town of Cutler Bay  
Cutler Bay Town Center  
10720 Caribbean Blvd. Suite 105  
Cutler Bay, Florida 33189  
Tel: (305) 234-4262  
Fax: (305) 234-4251

[www.cutlerbay-fl.gov](http://www.cutlerbay-fl.gov)



Please consider the environment before printing this e-mail



PLEASE NOTE: Under Florida law, e-mail addresses are public records. If you do not want your e-mail address released in response to a public records request, do not send electronic mail to this entity. Instead, contact this office by phone or in writing.

Exhibit B  
Page 2 of 4

**From:** Mitchell Bierman [mailto:mbierman@wsh-law.com]  
**Sent:** Monday, July 20, 2015 3:48 PM  
**To:** Rafael Casals  
**Subject:** RE: Insurance RFP

Ralf,

The failure to sign appendix A amounts to a failure to sign the bid. Accordingly, the bid is non-responsive and cannot be accepted.

**From:** Rafael Casals [mailto:RCasals@cutlerbay-fl.gov]  
**Sent:** Monday, July 20, 2015 3:31 PM  
**To:** Mitchell Bierman  
**Subject:** RE: Insurance RFP

Mitch:

Appendix A – Acknowledgement, Warranty and Acceptance

Appendix B – Non Collusive Affidavit

Acknowledgement Form

Appendix C – Sworn Statement on Public Entity Crimes

Rafael Casals, CFM  
Town Manager

Town of Cutler Bay  
Cutler Bay Town Center  
10720 Caribbean Blvd. Suite 105  
Cutler Bay, Florida 33189  
Tel: (305) 234-4262  
Fax: (305) 234-4251

[www.cutlerbay-fl.gov](http://www.cutlerbay-fl.gov)

Exhibit B  
Page 3 of 4



Please consider the environment before printing this e-mail



PLEASE NOTE: Under Florida law, e-mail addresses are public records. If you do not want your e-mail address released in response to a public records request, do not send electronic mail to this entity. Instead, contact this office by phone or in writing.

**From:** Mitchell Bierman [<mailto:mbierman@wsh-law.com>]  
**Sent:** Monday, July 20, 2015 3:28 PM  
**To:** Rafael Casals  
**Subject:** RE: Insurance RFP

What documents were omitted?

**From:** Rafael Casals [<mailto:RCasals@cutlerbay-fl.gov>]  
**Sent:** Monday, July 20, 2015 9:08 AM  
**To:** Mitchell Bierman  
**Subject:** Insurance RFP

Mitch:

As per our discussion, please find attached RFP # 15-10

Thanks,

Rafael Casals, CFM  
Town Manager

Town of Cutler Bay  
Cutler Bay Town Center  
10720 Caribbean Blvd. Suite 105  
Cutler Bay, Florida 33189  
Tel: (305) 234-4262  
Fax: (305) 234-4251

Exhibit B  
Page 4 of 4

[www.cutlerbay-fl.gov](http://www.cutlerbay-fl.gov)



Please consider the environment before printing this e-mail



PLEASE NOTE: Under Florida law, e-mail addresses are public records. If you do not want your e-mail address released in response to a public records request, do not send electronic mail to this entity. Instead, contact this office by phone or in writing.

**From:** Mitchell Bierman [<mailto:mbierman@wsh-law.com>]  
**Sent:** Friday, July 17, 2015 7:14 PM  
**To:** Rafael Casals  
**Subject:** Fwd: ShoreTel voice message from INS 28CUTLER BA, +13052344262 for mailbox 219

I got you message. I would like to see the RFP so I can determine responsiveness. However, it seems like with only one proposer, you have leeway to reject the bid or accept it.

Sent from my iPhone

Begin forwarded message:

**From:** ShoreWare Voice Mail <[voicemail@wsh-law.com](mailto:voicemail@wsh-law.com)>  
**Date:** July 17, 2015 at 2:39:52 PM EDT  
**To:** <[mbierman@wsh-law.com](mailto:mbierman@wsh-law.com)>  
**Subject:** ShoreTel voice message from INS 28CUTLER BA, +13052344262 for mailbox 219

You have received a voice mail message from INS 28CUTLER BA, +13052344262 for mailbox 219.  
Message length is 00:00:24. Message size is 190 KB.

Mitchell Bierman

Member



2525 Ponce de Leon Blvd., Suite 700 | Coral Gables, FL 33134  
P: (305) 854-0800 F: (305) 854-2323 [wsh-law.com](http://wsh-law.com) | vCard

