



## Office of the Town Manager

Rafael G. Casals  
Town Manager

# MEMORANDUM

To: Honorable Mayor and Town Council

From: Rafael G. Casals, Town Manager

Date: March 21, 2018

Re: Issuance of Request for Proposals (RFP) #18-04:  
Agent/Broker of Record for Insurance Services

## REQUEST

**A RESOLUTION OF THE MAYOR AND TOWN COUNCIL OF THE TOWN OF CUTLER BAY, FLORIDA, AUTHORIZING THE ISSUANCE OF A REQUEST FOR PROPOSALS (RFP) FOR PROFESSIONAL AGENT/BROKER OF RECORD FOR INSURANCE SERVICES; AND PROVIDING FOR AN EFFECTIVE DATE.**

## BACKGROUND AND ANALYSIS

The Town offers a comprehensive benefits package for its full-time staff, elected and charter officials, which includes medical, dental, vision and other related programs.

In order to comply with our procurement process, staff has developed a Request for Proposals in which one (1) qualified and licensed Professional Services Contractor (the "Contractor") will be selected. The Contractor will be selected based on:

- **Scope of Services/Plan:** Approach to the Scope of Services, specifically a work plan explaining the methodology to be followed in order to perform the services required.
- **Compensation:** Unit pricing based on the Scope of Services.
- **Proposer Qualifications & Experience:** Description of the firm, including the size, range of activities, and the number of years with relative experience with governmental accounts.
- **References:** Town will conduct an investigation of references, including a record check or consumer affairs complaints.

Chapter 24, Article II, Section 24-45 of the Town Code requires the Town Manager to obtain authorization from the Town Council to advertise solicitations for bids and proposals prior to advertising the solicitation. Additionally, pursuant to Chapter 287.055, Florida Statutes, the Town must conduct an announced competitive process, which will be satisfied by the Town conducting the RFP process.

## RECOMMENDATION

We recommend that the attached Resolution authorizing the Town Manager to issue a Request for Proposals (RFP #18-04) be adopted.

