

**FORM A: PROPOSAL**  
(See B9)

1. Contract Title PROVISION OF INSURANCE AND RELATED RISK MANAGEMENT SERVICES

2. Bidder

\_\_\_\_\_  
Name of Bidder

\_\_\_\_\_  
Street

\_\_\_\_\_  
City

\_\_\_\_\_  
Province

\_\_\_\_\_  
Postal Code

\_\_\_\_\_  
Facsimile Number

(Mailing address if different)

\_\_\_\_\_  
Street or P.O. Box

\_\_\_\_\_  
City

\_\_\_\_\_  
Province

\_\_\_\_\_  
Postal Code

The Bidder is:

(Choose one)

a sole proprietor

a partnership

a corporation

carrying on business under the above name.

3. Contact Person

The Bidder hereby authorizes the following contact person to represent the Bidder for purposes of the Proposal.

\_\_\_\_\_  
Contact Person

\_\_\_\_\_  
Title

\_\_\_\_\_  
Telephone Number

\_\_\_\_\_  
Facsimile Number

4. Definitions

All capitalized terms used in the Contract shall have the meanings ascribed to them in the General Conditions and D3.

5. Offer

The Bidder hereby offers to perform the Work in accordance with the Contract for the Fees, in Canadian funds.

6. Execution of Contract

The Bidder agrees to execute and return the Contract no later than seven (7) Calendar Days after receipt of the Contract, in the manner specified in C4.1.

7. Commencement of the Work  
The Bidder agrees that no Work shall commence until he is in receipt of a notice of award from the Award Authority authorizing the commencement of the Work.

8. Contract  
The Bidder agrees that the Request for Proposal in its entirety shall be deemed to be incorporated in and to form a part of this offer notwithstanding that not all parts thereof are necessarily attached to or accompany this Proposal.

9. Addenda  
The Bidder certifies that the following addenda have been received and agrees that they shall be deemed to form a part of the Contract:

No.	_____	Dated	_____
	_____		_____
	_____		_____

10. Time  
This offer shall be open for acceptance, binding and irrevocable for a period of one hundred twenty (120) Calendar Days following the Submission Deadline.

11. Signatures  
The Bidder or the Bidder's authorized official or officials have signed this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_ .

Signature of Bidder or  
Bidder's Authorized Official or Officials

\_\_\_\_\_

(Print here name and official capacity of individual whose signature appears above)

\_\_\_\_\_

(Print here name and official capacity of individual whose signature appears above)

**FORM N: INSURANCE BROKER/ADVISOR AND RELATED SERVICES**  
(See B11)

**Bidders shall provide a written response, on a separate page, to each item listed on Form N. The written response should be numbered to correspond with each item listed.**

PREAMBLE: In addition to its core commercial insurance, claims management and risk management programs, the City of Winnipeg is involved in numerous unique projects with specific and often dynamic requirements. This Request for Proposal is intended to identify, select and approve a core group of advisors to be engaged individually or collectively as needed on portions of the City's programs throughout the agreement period, and as periodically assigned by the City of Winnipeg's Risk Management Division.

With the exception of the City's Core Insurance and Autopac program which will be assigned to a single Broker/Advisor, upon completion of the bid review process, successful Bidders will be placed on an Approved Broker/Advisor Schedule (Approved Schedule). The Approved Schedule will identify Bidders who have successfully met the criteria as evaluated in B18.

**A) SERVICE AND EXPERIENCE**

- 1) Provide a brief history of your firm, addressing items including company size and growth, mission statement, organization structure, staffing levels and locations.
- 2) Brokerage and/or advisory firms for the City of Winnipeg (City) are required to maintain adequate errors and omissions insurance as described in D8. Provide particulars of your firm's errors and omissions insurance, including limits.
- 3) Has your firm had any specific experience during the last five years delivering insurance and risk management services to governmental clients? If yes, please elaborate briefly.
- 4) Has your firm had any specific experience during the last five years delivering insurance and risk management services to large commercial (non-governmental) clients, with operations and coverages that are comparable to those of the City? If yes, please elaborate briefly.
- 5) Does your firm have experience in non-traditional risk areas and in developing alternative or integrated risk solutions which may include transfer operational exposures? If yes, elaborate briefly.
- 6) Does your firm provide Enterprise Wide Risk Management advice? If yes, please elaborate briefly.
- 7) Who will be assigned ultimate responsibility for the City account? Elaborate, including name, position, function and location. Who will be the primary back up(s) for this position (name, position, function and location)?
- 8) The City's Risk Management Division requires that approved brokerage/advisory firms to be available on a daily basis during City of Winnipeg business hours as outlined in clause E2.6 with consistent and expert resources for insurance administrative services, consultation and advice on insurance, risk management and related issues and a list of the local representative(s) who will be assigned to deliver the day-to-day service to the City. Elaborate briefly on their experience, qualifications, and areas of expertise (e.g. Bonds, property, casualty, automobile, claims, risk management, risk control including capacity and back-up resources). Include details of back-up resources, support and availability.
- 9) Describe your preferred method(s) of communication in relation to the various services contemplated in this Proposal and any alternative or additional communication methods that may be of interest to us and you currently are in a position to provide.
- 10) Does your local office operate primarily on its own, or is it backed up by a larger organization, association, or partnership arrangement? Please elaborate briefly.

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**B) COMMERCIAL INSURANCE EXPERTISE AND RESOURCES**

- 1) Briefly describe the underwriting markets to which your firm has access. Elaborate on how these markets will meet the needs of the City.
- 2) Briefly describe the process your firm will use to market the City's insurance account. Elaborate on your marketing strengths and capacity, and how these factors will meet the needs of the City.
- 3) Briefly describe any unique insurance related qualifications your firm will bring into play to the benefit of the City.
- 4) How long has your brokerage firm been licensed and operating in Manitoba?
- 5) The City requires the brokerage/advisory firm who is awarded the core program and auto to be a licensed and accredited Autopac agent, and to provide registration, licensing and insurance services to the City's two main fleets of approximately 550 buses plus 1650 licensed vehicles which operate almost exclusively within Manitoba. Briefly describe your firm's experience in servicing the Autopac needs of large client fleets. Elaborate briefly on the level of service you will provide.

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**C) RISK MANAGEMENT EXPERTISE AND RESOURCES**

- 1) The City's Risk Management Division requires that approved broker/advisor to be fully trained in formal risk management principles and practices, with resources and experience that will be applied to the City's account. Elaborate briefly on your firm's experience in providing risk management services to your accounts, including specific persons and qualifications.
- 2) Briefly describe any unique risk management related qualifications your firm will bring into play to the benefit of the City.
- 3) The City's Risk Management Division has taken steps to include greater interaction with City departments driving aspects of risk management to operational levels. Briefly describe your recommended risk management methodology, framework and approach.
- 4) The Bidder will be expected to provide risk management services as outlined in PART E - SPECIFICATIONS including, but not limited to, the following:
  - a) Recommending a prudent balance in the Insurance Reserve Fund based on sound actuarial principles;
  - b) Providing a model for allocating risk financing, risk control and risk retention costs to respective operating departments; and
  - c) Providing an inspection program of selected assets, buildings, facilities and operations for risk control purposes;
  - d) Assistance in developing a risk integration model and enterprise risk management process;
  - e) Assistance in developing Total Cost of Risk Metric for the City of Winnipeg.

**D) RELATED SERVICES**

- 1) Bidders may also be asked to provide related services in addition to insurance including, but not limited to claims management, loss control engineering, risk survey, risk assessment, appraisal, and security

Briefly describe your firm's ability to provide these and related risk management services. We also welcome brief comment on any additional value added service areas that your firm offers and you feel are appropriate to the City's risk management initiatives going forward.

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**E) TECHNOLOGY**

- 1) What automated technology platform(s)/systems do you use in servicing the needs of your large clients? Please elaborate briefly.
- 2) Briefly describe any unique technological capabilities your firm will bring into play to the benefit of the City.
- 3) Briefly describe your organization's disaster recovery and business resumption process which is currently in place in the event of a system failure.

**F) TRANSITION IMPLEMENTATION PLAN**

- 1) Bidders shall describe their plan to transition and implement the City's current programs to their service model, including identification of transition team members.