

**PART A**

**PROPOSAL SUBMISSION**

**FORM A: PROPOSAL**  
(See B10)

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

2. Bidder

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

\_\_\_\_\_  
Street

\_\_\_\_\_  
City

\_\_\_\_\_  
Province

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

(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 D4 unless the context otherwise requires.

5. Qualification

The Bidder has in the past performed the works listed on Form C: Qualification, appended hereto, which were similar in nature, scope and value to the Work for which this offer is made.

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 GC.3.01.

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7. Commencement of the Work The Bidder agrees that no Work shall commence until he is in receipt of a letter of intent 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 Submission.

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 ninety (90) Calendar Days following the Submission Deadline.

11. Signatures In witness whereof the Bidder or the Bidder's authorized official or officials have signed this

\_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

Signed and sealed in the presence of:

\_\_\_\_\_  
(Witness)

\_\_\_\_\_  
(Witness)

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)

SEAL

**FORM C: QUALIFICATION**  
(See B12)

PROVISION OF INSURANCE AND RELATED RISK MANAGEMENT SERVICES

Year: _____
Client: _____
Client Contact: _____ Telephone No.: _____
Description of contract: _____
_____
_____
_____
_____
_____
Year: _____
Client: _____
Client Contact: _____ Telephone No.: _____
Description of contract: _____
_____
_____
_____
_____
_____
Year: _____
Client: _____
Client Contact: _____ Telephone No.: _____
Description of contract: _____
_____
_____
_____
_____
_____

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

## **FORM N: INSURANCE BROKER AND RELATED SERVICES**

(See B13)

**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.**

### PROVISION OF INSURANCE AND RELATED RISK MANAGEMENT SERVICES

#### **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) The brokerage firm for the City of Winnipeg is required to maintain adequate errors and omissions insurance. 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 of Winnipeg? If yes, please elaborate briefly.
- 5) Where is your head office located?

- 6) Who will be assigned ultimate responsibility for the City of Winnipeg account? Elaborate, including name, position, function and location.
  
- 7) The City of Winnipeg Risk Management Branch requires their brokerage firm to be available on a daily basis during business hours with consistent resources for certificate of insurance administrative services, consultation and advice on insurance and related issues. List the local representative(s) who will be assigned to deliver the day-to-day service to the City. Elaborate briefly on their experience, qualifications, areas of expertise (eg. Bonds, property, casualty, automobile, claims) and capacity and back-up resources.
  
- 8) Describe your preferred method(s) of communication in relation to the various services contemplated in this Proposal.
  
- 9) 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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PROVISION OF INSURANCE AND RELATED RISK MANAGEMENT SERVICES

**B) 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 of Winnipeg 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) For how long has your brokerage firm been licensed and operating in Manitoba?
  
- 5) The City requires its brokerage firm 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 450 buses plus 1,650 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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### PROVISION OF INSURANCE AND RELATED RISK MANAGEMENT SERVICES

#### **C) RISK MANAGEMENT EXPERTISE AND RESOURCES**

- 1) The City of Winnipeg Risk Management Branch requires the brokerage firm to be fully trained in formal risk management principles and practices, with resources and experience that will be applied to the City of Winnipeg 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) In recent years the City's Risk Management Branch has taken steps to include greater interaction with City departments in the form of introducing best practices and heightening awareness of potential risks and their management. Briefly describe your 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 costs to the respective operating departments; and
  - c) Providing an inspection program of selected assets, buildings, facilities and operations for risk control purposes.

Briefly describe your firm's ability to provide these and related risk management services.



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PROVISION OF INSURANCE AND RELATED RISK MANAGEMENT SERVICES

**D) TECHNOLOGY AND OTHER RESOURCES**

- 1) What automated or computerized 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.

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(See B13)

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PROVISION OF INSURANCE AND RELATED RISK MANAGEMENT SERVICES

**E) CONFORMANCE WITH SPECIFICATIONS**

- 1) Bidders shall provide a written response to each item in E2.2 shown as E2.2 (a) to (n).