



Request For Proposal

Waukeee Area Chamber Insurance Policy
Waukeee Area Chamber of Commerce
PROPOSALS DUE BY: November 9, 2022

Company Background

The Waukee Area Chamber of Commerce (the “Chamber”), located in Waukee, Iowa, is the local chamber for the fastest growing large city in Iowa. Its mission is to serve as the guide, connector, and cheerleader for the Waukee-area business community. We help local businesses of all sizes become connected so they can thrive with the Waukee community on their side.

Project Overview

The Chamber is looking to secure a three-year liability and business insurance policy.

Project Goals

The goals of this project include:

- i. Identify an insurance agency in the central Iowa area to deliver excellent service and consultation.
- ii. Collaborate with an insurance agency in the central Iowa area to provide cost effective proper coverage. Coverages to include Liability, Cyber, Crime, Property, and Umbrella.
- iii. The Chamber is looking for a customized recommendation for the next policy, not options.

Scope of Work

Coverage Type	Limit
Personal Property Coverage	\$160,000
General Liability	1 Million / 2 Million
Management Liability	2 Million
Cyber	\$50,000
Crime	\$100,000
Umbrella	1 million
Deductible	\$1,000

Target Deliverable Schedule

RFP Released: October 25th, 2022

Deadline for questions: November 2nd, 2022

Deadline to notify of intent to respond: November 2nd, 2022

Deadline for response submissions: November 9th, 2022

Consideration of proposals: November 9th - 16th

Project awarded: November 17th, 2022

Start of Policy Issuance: March 15th or Sooner

Note: If these dates need to be adjusted, please include your readjusted proposed schedule, as well as your reasoning for shifting the schedule. All proposed date changes will be considered.

Budget Constraints

As a not-for-profit organization, the Chamber is looking for competitive bids to complete the scope of this RFP.

Evaluation Metrics

The Chamber will evaluate bidders and proposals based on the following scoring rubric:

Points	Criteria
35	<p>Outcome Deliverables</p> <ul style="list-style-type: none">• The extent to which the vendor’s proposed solution fulfills the stated requirements as stated in the RFP• Strategic aspects of the proposal to meet the RFP’s goals
10	<p>Vendor Information</p> <ul style="list-style-type: none">• An assessment of the vendor’s ability to deliver the necessary services in accordance with specifications set out in the RFP• The vendor’s stability, experience, and record of past performance in delivering similar services to similar clients
10	<p>Vendor Diversity</p> <ul style="list-style-type: none">• The chamber is interested in proposals from diverse suppliers, and working with diverse individuals.
5	<p>Chamber Membership Status</p> <ul style="list-style-type: none">• The chamber prioritizes giving business back to its active members.
40	<p>Cost</p> <ul style="list-style-type: none">• Overall cost of the vendor’s proposal and projected ongoing maintenance costs.

Questions Bidders Must Answer To Be Considered

1. Describe your organization's history, strengths and overall experience providing the services required for this RFP.
2. Identify the individual(s) or project team to be assigned to the project; list their credentials, skills, knowledge and experience in this area of work.

Submission Requirements

Submissions must include the following components to be considered:

- Proposed services
- Proposed process
- Project cost
- Project timeline
- Payment schedule and terms
- Responses to questions
- Contact information

- Custom recommendation, not options

Bidders must adhere to the following guidelines to be considered:

- Bidders who are interested in submitting a response should inform Michael Bartos (michael@waukeechamber.com) no later than November 2nd.
- Questions related to this RFP should be submitted by November 2nd. Responses to all questions will be returned via email to all interested responders by November 2nd.
- Responses must be submitted by November 9th.
- A proposed schedule must also be included and clearly expressed, including any changes to the deadlines established in the RFP.

What We're Looking For in Potential Vendors

Ideal vendors are chamber members and have experience working with not-for-profit organizations. The Chamber is looking for a partner who will work with the chamber's staff and board of directors to meet or exceed the goals for this RFP. A successful experience with this project may lead to additional future work.

Terms and Conditions

Right of Rejection and Clarification

The Chamber reserves the right to accept or reject any or all proposals or to waive any technicality, and accept any proposal deemed to be in the best interests of the Chamber.

Incurring Costs

The Chamber is not liable for any cost incurred by proposers in replying to this RFP. This includes costs to determine the nature of the proposal, submitting, negotiating, presentations, or any other costs a vendor would incur in responding to the RFP.

Fixed Price Period

All prices, costs, and conditions in the proposal shall remain firm and valid for acceptance for 30 days after the due date of this solicitation to allow evaluation and award determination, unless indicated otherwise. Once awarded, prices shall remain firm for the duration of the contract.

Independent Contractor Status

The Vendor agrees it is an independent contractor with respect to the services provided pursuant to this RFP. Nothing in this RFP shall be considered to create the relationship of employer and employee between the parties.

Rights to Submitted Material

It shall be understood that all proposals, responses, inquiries or correspondence relating to or in reference to this RFP, and all reports, charts, and proposal or referencing information submitted in response to this RFP shall become the property of the Chamber and will not be returned. The Chamber will use discretion with regards to disclosure of proprietary information contained in any response, and will only use said proprietary information for the consideration and selection of a Vendor.

Nondisclosure

If the Vendor is selected, they will be required to sign a non-disclosure agreement protecting any confidential information provided by the Chamber during the course of the project.

Additional Terms

The Chamber reserves the right to request additional terms or conditions at the time of awarding the project in the form of a master services agreement, non-disclosure agreement, or other contract.

Contact Information

Questions or concerns related to this RFP should be directed to:

Michael Bartos
President & CEO
michael@waukeechamber.com
515-978-7115