



# **REQUEST FOR QUALIFICATIONS**

## **RISK MANAGEMENT**

### **CONSULTANT**

Cleveland County Government

311 E Marion St

PO Box 1210

Shelby, NC 28151



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**Cleveland County**  
NORTH CAROLINA

**REQUEST FOR QUALIFICATIONS  
(RFQ)**

**SCOPE OF PROJECT**

Cleveland County is evaluating their Risk Management Consulting Service options and has identified the following project goals:

- Ensure appropriate procedures and guidelines are in place to eliminate any actual or potential conflicts of interest.
- Assemble a broker service team that can provide the expertise to address Cleveland County's insurance/risk management issues.
- Identify partners with the capability and expertise to identify opportunities to add additional value to the organization.

Please send all RFQ responses to [thadd.hodge@clevelandcountync.gov](mailto:thadd.hodge@clevelandcountync.gov) or mail to:

Cleveland County Finance  
311 E Marion St.  
Shelby, NC 28150  
Attn: RFQ – Insurance Consultant

For questions or inquiries please email [sherrie.geer@clevelandcountync.gov](mailto:sherrie.geer@clevelandcountync.gov).



**SECTION 1  
KEY DATES**

	<b>Activity</b>	<b>Target Date*</b>
1.	RFQ posted on website	5/4
2.	Qualifications received from firms by	6/01
3.	Interviews to be held at Cleveland County	Week of 6/6
4.	Selection of consultant	6/30
5.	Execution of Broker Services Contract	7/1
6.	Effective Date of Program	Various

\*Target dates are subject to change based on schedules.

## SECTION 2 RESPONSE GUIDELINES

### Response Instructions & Documents

#### Overview

*An acceptable and complete response to this Request for Qualification will include the following information:*

#### Specific Questions

Please provide clear and concise responses to the following:

- A. Provide a brief history and description of your firm. This includes the size (number of employees and/or revenues) and areas of specialization. Provide specific information for the office that would handle the account.
- B. Provide the names, titles and experience of each individual that would be assigned to work on the account. This should include account executives, marketing personnel, technical representatives, and others that would be actively involved. Identify the individual within your firm who would have overall responsibility and identify the office in which each account member is located.
- C. Provide the names, addresses, and telephone numbers of at least three, but no more than eight, Public Entity clients handled by your firm. For the Cleveland County references provided, list the risk management services currently being handled and the length of time you have handled them.
- D. Describe any special expertise your firm has in providing to consulting services to organization similar to Cleveland County. Include in your response any capability of your firm in the areas of research and benchmarking.
- E. Describe the process you would employ to evaluate and keep abreast of Cleveland County's loss exposures.
- F. Provide a sample of your firm's service agreement, including the term, services to be provided, and associated



## Cleveland County

NORTH CAROLINA

G. Specifically, describe your organization's in-house capabilities and methodology for providing insurance and risk management services, particularly relating to public entity exposures including but not limited to:

- ◆ **Checking policies, audits, endorsements and requesting corrections**
- ◆ **Reviewing contracts for insurance/risk management implications**
- ◆ **Preparing Funding Studies**
- ◆ **Negotiating with insurance representative and/or brokers**
- ◆ **Obtaining all services available from insurance carriers.**
- ◆ **Designing a program for responsive delivery of certificates of insurance**
- ◆ **Claims assistance, as needed**
- ◆ **Designing insurance program structure**
- ◆ **Insurance program audits**
- ◆ **Advising on new program structures and risk management techniques**
- ◆ **Comparing insurance proposals**
- ◆ **Retention/ deductible analysis**
- ◆ **Insurance specifications for obtaining bids**
- ◆ **Self-insurance programs**
- ◆ **Negotiating broker service agreements and fees**
- ◆ **Loss control advice**
- ◆ **Negotiating on insurance carrier recommendations**
- ◆ **TPA audits and bids**
- ◆ **Broker selection and competitive bid RFPs**