

Request for Qualifications: Insurance Brokerage with Expertise in Nonprofit and Mission-Based Organizations

Date Released: October 17, 2023
Responses Due: November 10, 2023 at 5:00 pm

1. Background

The South Baltimore Gateway Partnership (SBGP) is an innovative and nimble economic development authority working within a collection of neighborhoods across south and southwest Baltimore known as the South Baltimore Gateway Community Impact District. Under the SBGP strategic plan, the organization focuses on implementing three crucial elements of the 2015 South Baltimore Gateway Master Plan: Environmental Sustainability, Health and Wellness, and Community Development and Revitalization. More information about SBGP can be found at www.sbgpartnership.org.

SBGP is a mission-driven organization, and though it is technically a governmental body, it functions in a manner very similar to a nonprofit organization. Much of its work involves collaborating with nonprofit partners or serving the interests of community organizations. For example, as part of its regular work, SBGP:

- Provides grants to nonprofit organizations for youth programs, cultural programs, community gardens, economic development projects, etc.
- Hires vendors to pick up trash, mow grass, plant flowers, provide sports programs, and build/renovate public facilities such as gazebos and recreation centers.
- Manages the restoration of wetlands and nature-based resiliency infrastructure.

SBGP has an annual budget in excess of \$8 million per year.

2. Scope of Work

SBGP is seeking an insurance brokerage to serve as its principal source of insurance coverage and risk management advice. In particular, it is seeking a

brokerage with expertise in insurance and risk management issues related to nonprofit organizations and other mission-based organizations.

SBGP anticipates seeking coverage that is equivalent or superior to its existing coverage, including:

- Business Owner's Policy / General Liability, Property, and Auto
- Workers' Compensation
- Cyber Liability
- Crime
- Management Liability
- ERISA Bond

3. Timeframes for Submission and Implementation

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Selection Made:	December 1, 2023

Work is expected to begin once a selection is made and any necessary paperwork for the engagement is signed. Policy adoption may need to be synchronized with the current policy terms.

4. Proposal Instructions:

Each respondent must comply with the submission requirements as outlined. Submittals that fail to comply with the requirements as specified may be deemed non-responsive and such determination will result in no further consideration of that respondent or the respondent's submittals by SBGP. At any stage, SBGP reserves the right to terminate, suspend, or modify this selection process; reject any or all submittals at any time; and waive any informalities, irregularities, or omissions in submittals, as the best interests of SBGP may require.

No responding firm may submit more than one response.

Interested parties should submit the following.

- A. A narrative describing the qualifications of your firm or team, responding specifically to the evaluation criteria listed below.
- B. Examples of similar clients and past work.
- C. Resumes of key team members.
- E. A disclosure of any actual, potential, or perceived conflicts of interest (see below).

Submissions should be formatted in PDF and received no later than November 10, 2023 at 5PM.

Email responses to procurement@sbgpartnership.org.

Oral, telephonic, hard copy, or faxed documents will not be accepted and will be considered non-responsive.

5. Evaluation Process

Qualifications will be reviewed by SBGP staff. The reviewer(s) will check responses against the criteria below. Responses not meeting the criteria will not be considered for review. Respondents meeting the criteria may be contacted for subsequent interview(s) prior to final selection.

The goal of all SBGP contracting and procurement is to ensure the best use of public funds to serve the public good by fulfilling SBGP’s mission while adhering to the highest standards of professional and ethical behavior. SBGP is committed to ensuring that all funds entrusted to the entity are appropriately allocated using fair, ethical, competitive, consistent, equitable, reasonable, responsible, and transparent practices that demonstrate integrity.

These values guide all SBGP conduct and decision making related to procurements, bids/estimates for goods and services, agreements, contracts, and related forms of commitments.

Based upon this review, the panel will then identify the respondent that most closely meets the qualifications required for the engagement. Respondents will be notified of the result by approximately **December 1, 2023**.

6. Evaluation Criteria

Respondents will be evaluated based upon the following criteria:

Criteria	Max Points
Experience in providing insurance coverage and risk management services to nonprofit and mission-based organizations	30
Specific experience providing these services to organizations involved in one or more of the following undertakings: <ul style="list-style-type: none"> Providing grants to small nonprofit organizations. 	40

<ul style="list-style-type: none"> • Funding youth activities such as sports and recreation. • Overseeing maintenance or construction activities. • Environmental restoration. 	
Existing relationships with insurance providers whose policies are designed to address the needs of the nonprofit industry and similar mission-based organizations.	20
Ability to provide coverage that is equivalent or superior to SBGP’s existing coverage.	10
Total Available Points	100

7. MBE/WBE Goals

SBGP strongly encourages minority-owned and woman-owned firms to submit proposals.

Respondents should indicate whether they are certified as an MBE and/or WBE vendor by the City of Baltimore.

8. Impact Investments

While ultimately each vendor must be able to provide excellent products or services at a fair price, SBGP is committed to seeking out Impact Investments, including those that support minority- and woman-owned businesses, local businesses, and social enterprises. Wherever feasible, SBGP will use these Impact Investments to further its mission by supporting local and minority- and woman-owned businesses, associated hiring opportunities, community-driven social impact, and the local economy. Each of SBGP’s contractual relationships is designed to expand its network and ability to access a strong pool of diverse vendors to meet SBGP’s needs.

To carry out the goal of SBGP contracting and procurement, SBGP will:

1. Seek out opportunities to foster equal opportunities, minority- and woman-owned businesses, and other Impact Investments.
2. Educate vendors about how to conduct business with SBGP.
3. Engage in a fair, ethical, competitive, consistent, equitable, reasonable, responsible, and transparent procurement process.

9. Equal Opportunity

SBGP will not discriminate in its procurement regarding race, ethnicity, religion, gender, sexual orientation, national origin, marital status, age, disability, or any other characteristic protected by law.

SBGP does reserve the right to select, from among a pool of qualified submissions, the one that best provides an opportunity to further its mission through Impact Investment.

10. General Provisions

Neither this solicitation, nor any submissions provided in response to it, constitute a contract between SBGP and the respondent.

Respondents who are not successful may request a meeting to debrief about the selection process. SBGP documents created or used during the selection process, including any score cards, notes, emails, memos, or other written materials, are internal materials and will not be made available.

Late responses, or responses that do not fully address the requirements of the RFQ, will be disqualified.

SBGP may issue a new RFQ, extend the deadline, or make other good faith efforts to expand the applicant pool if the market for goods or services is limited.