



110 SE Watula Avenue, Third Floor  
Ocala, Florida 34471  
**Main Number:** (352) 629-8402  
[www.bidocala.com](http://www.bidocala.com)

The City of Ocala is accepting sealed electronic submissions for:

## **CASUALTY ACTUARIAL SERVICES REQUEST FOR PROPOSALS (“RFP”) #: FIN/240873**

Official copies of all solicitation documents may be obtained via electronic download from the City of Ocala’s e-procurement portal located at: <https://www.bidocala.com>

**\*\* Copies of documents obtained from any other source are not considered official copies. \*\***

**Pre-Submittal Conference:** NONE.

**Deadline for Questions:** **August 7, 2024 at 5:00 p.m. (EST)**

All questions or inquiries regarding this solicitation must be submitted via e-mail to the Buyer Contact identified below or via the e-procurement portal no later than the Deadline for Questions noted above. Any questions received after the deadline will not be considered.

**Where to Submit Proposals:** **City of Ocala’s E-Procurement Portal:**  
<https://www.bidocala.com>

**Submission Deadline:** **August 13, 2024 at 2:00 p.m. (EST)**

Sealed electronic submissions shall be accepted up to the Submission Deadline. Submissions received after the deadline and/or transmitted to the City of Ocala outside of the e-procurement portal shall be rejected. The e-procurement portal’s timestamp shall be conclusive as to the timeliness of filing.

**Vendor Registration:** Bidders must be a registered vendor within the ProRFx e-procurement portal in order to submit a response to this Solicitation. **There is no charge to register, simply follow the registration path for “New Vendor Registration” at <https://www.bidocala.com>.**

**Buyer Contact/  
Direct All Inquiries To:** **EILEEN MARQUEZ, SENIOR BUYER**  
**E-Mail:** [emarquez@ocalafl.gov](mailto:emarquez@ocalafl.gov)  
**Phone:** (352) 629-8362

**Notice to Proposers:** The point of contact for all questions and issues relating to this Solicitation shall be the Buyer Contact identified above.

To ensure that your submission is deemed responsive, you are urged to request clarification or guidance regarding any issues involving this solicitation **prior to submitting** your response.

**THE CITY OF OCALA RESERVES THE RIGHT TO REJECT ANY AND ALL SUBMISSIONS**

## SECTION 1 INTRODUCTION AND GENERAL INFORMATION

The City of Ocala seeks competitive proposals from qualified firms interested in providing Casualty Actuarial Services for the City of Ocala. This RFP provides prospective proposers with sufficient information to enable them to prepare and submit proposals for consideration by the City of Ocala, to satisfy the needs, as outlined, in the scope of services. Proposers are strongly encouraged to carefully read the entire Request for Proposal and its attachments.

It is anticipated that one (1) firm will be awarded the contract to provide casualty actuarial services for an initial term of three (3) years, with one (1) optional three-year renewal term.

**1.1 LOCAL VENDORS.** The City of Ocala encourages active participation by local vendors. In accordance with Section 22-2 of the City's Code of Ordinances, this Solicitation **DOES NOT QUALIFY** for Local Vendor Preference.

**1.2 QUESTIONS AND CLARIFICATIONS.**

- (a) Proposers are responsible for verifying all listing information prior to submitting a response to the Solicitation.
- (b) Proposers must communicate any questions regarding this Solicitation by the deadline set forth above.
- (c) Any and all questions must be submitted to the Procurement Department electronically via [www.bidocala.com](http://www.bidocala.com). Responses will be made electronically and posted online. It is the responsibility of the proposers to check for updates.
- (d) If necessary, any addenda shall be posted to the [www.bidocala.com](http://www.bidocala.com) website.
- (e) It is our standard policy that no addendum will be issued less than three (3) calendar days prior to the deadline established for receipt of proposals, except for an addendum withdrawing the solicitation or one which includes postponement of the date for receipt of proposals.
- (f) No verbal or written information obtained by means other than those set forth in this Solicitation, or by addendum thereto, shall be binding upon the City.

**1.3 AMENDMENTS TO SOLICITATION.**

- (a) Should it become necessary for the City to revise or amend any part of a solicitation, Procurement and Contracting Department staff shall furnish the revision or amendment via written addendum, comment, and/or question and answer posted in the City's e-procurement system under the appropriate solicitation.
- (b) Addenda, comments, questions and answers should be reviewed by interested parties. Lack of review will not excuse Proposers from adherence to any requirements set forth therein.
- (c) If there is a discrepancy with the scope of work that City determines, in its sole discretion, to be unfair to the Proposers, City may postpone the bid opening at any time in order to

make corrections. City further reserves the right to extend the bid opening at any time during the bid process.

- 1.4 ADA NEEDS/ACCOMMODATIONS:** If reasonable accommodations are needed in order for an interested Proposer to participate in this solicitation, please contact the Buyer Contact identified above at least forty-eight (48) hours in advance so that arrangements can be made.
- 1.5 MINORITY/DISADVANTAGED BUSINESS ENTERPRISE PARTICIPATION.** The City of Ocala encourages the active participation of minority businesses, women's businesses, and labor surplus area firms whenever possible as either prime contractors or subcontractors. If subcontracts are to be let through a prime subcontractor, the prime contractor is required to take the following affirmative steps:
- (a) placing qualified small and minority businesses and women's business enterprises on solicitation lists;
  - (b) assuring that small and minority businesses and women's business enterprises are solicited whenever they are potential sources;
  - (c) when economically feasible, dividing total requirements into smaller tasks or quantities to permit maximum participation by small and minority businesses and women's business enterprises;
  - (d) establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses and women's business enterprises; and
  - (e) using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce.
- 1.6 CERTIFICATION OF ACCEPTANCE:** By responding to this solicitation, Proposer certifies that he/she has carefully read the solicitation documents, including any addenda, exhibits, attachments, and/or appendices in their entirety and agrees that to the best of his/her knowledge no pages or parts of the documents appear to have been omitted and that he/she fully understands, accepts, and agrees to fully comply with the requirements and conditions set forth therein.
- 1.7 COST INCURRED IN RESPONDING.** All costs directly or indirectly related to proposal preparation, representation or clarification shall be the sole responsibility of and be borne by the Proposer.
- 1.8 INDULGENCE.** Indulgence by the City on any non-compliance by the Proposer does not constitute a waiver of any rights under this request.
- 1.9 FEDERAL DEBARMENT.** By submitting a proposal, the Proposer certifies that no principal (which includes officers, directors, or executives) is presently suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction by any Federal department or agency.
- 1.10 PUBLIC ENTITY CRIMES.** A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a consultant, supplier, sub-consultant, or consultant under a contract with any public entity; and may not transact business any public entity in excess of the

threshold amount provided in s. 287.017 for CATEGORY TWO(\$35,000) for a period of 36 months following the date of being placed on the convicted vendor list.

**1.11 E-VERIFY.** The Proposer shall utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by the Proposer during the term of the contract and shall expressly require any sub-consultants performing work or providing services pursuant to the state contract to likewise utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by the sub-consultant during the contract term.

**1.12 MATERIALS.** All materials submitted in response to this solicitation shall become the property of the City.

**1.13 INTELLECTUAL PROPERTY RIGHTS.** The Proposer will indemnify and hold harmless, the City from liability of any nature or kind, including costs and expenses for or on account of any copyrighted, service marked, trademarked, patented or un-patented invention, process, article or work manufactured or used in the performance of the contract, including its use by the City. If the Proposer uses any design, device, materials or works covered by letters, service mark, trademark, patent, copyright, or any other intellectual property right, it is mutually agreed and understood without exception that the proposal prices will include all royalties of costs arising from the use of such design, device, or materials in any way involved in the work. This article will survive the termination of any contract with the City.

**1.14 CONFLICTS OF INTEREST**

- (a) The award hereunder is subject to the provisions of Chapter 112, Florida Statutes, as amended, governing conflict of interest.
- (b) All Proposers are required to disclose the name(s) of any employee(s), officer(s), director(s), shareholder(s), or other agent(s) of their firm that are also employee(s) or public official(s) of the City of Ocala concurrently with the submission of their Proposal.
- (c) All Proposers are required to disclose the name(s) of any City of Ocala employee(s) or public official(s) who either directly or indirectly owns or holds a five percent (5%) or more interest in Proposer's firm, corporation, or other business entity.
- (d) City of Ocala employees appointed persons, and elected officials (herein referred to as "employees") may engage in outside activities and hold financial interests subject to state and federal laws and regulations and the City of Ocala Employee Handbook, as applicable.
- (e) Every employee who is an officer, director, agent, employee, or owner of a substantial interest in any business entity which does or anticipates doing business with the City must complete and submit an "Officer and Employee Disclosure Statement" with every submission. This statement is available at <http://www.bidocala.com/wp-content/uploads/Officer-and-Employee-Disclosure-Statement-and-Intro.pdf>. **Failure to disclose known conflicts of interest shall result in Proposal rejection and/or contract termination, if awarded.**

**1.15 ANTI-LOBBYING/COMMUNICATION WITH CITY STAFF AND OFFICIALS.**

- (a) Lobbying is defined as any action taken by an individual, firm, association, joint venture, partnership, syndicate, corporation, or any other group who seeks to influence the

decision of a City Council member of City personnel after the advertisement of a solicitation and prior to the vote of City Council on the award of a contract.

- (b) To ensure fair consideration for all Proposers, the City strictly prohibits Proposer communication relative to this solicitation with any employee, department, City official, or City Council member, regardless of whether written, verbal, or through a third party, except for those inquiries made directly to the Procurement and Contracting Department through the assigned Buyer Contact, the City's Procurement Manager, or the City's Procurement and Contracting Officer ("Assigned Procurement Personnel").
- (c) Proposers (including their agents or other third parties on their behalf) are prohibited from initiating any communication with any employee, department, City official or City Council member that will evaluate or consider the Proposal prior to and up to the time that award is made at a scheduled City Council meeting.
- (d) Proposers (including their agents or other third parties on their behalf) are prohibited from discussing this Solicitation, or their submittals thereto, with competing firms under this Solicitation. All oral and written inquiries must be directed through Assigned Procurement Personnel.
- (e) **Proposers (or any third-party on their behalf) who lobby or initiate otherwise prohibited communications shall be disqualified from consideration for award; AND may be subject to a three (3) year debarment from doing business with the City of Ocala.**

**1.16 PUBLIC RECORDS.** All written competitive submissions received by the city pursuant to this RFP including all replies, oral presentations, other submissions, correspondence, meetings and records made thereof, and any other records concerning this solicitation shall be handled in accordance with Chapter 119, Florida Statutes, and Article 1, Section 24, of the Florida Constitution.

- (a) Sealed proposal responses or replies received by the City in response to its solicitations are exempt from public disclosure until such time as the City provides notice of an intended decision or until thirty (30) days after the opening of the proposals, whichever is earlier. If the City rejects all proposals or replies pursuant to this solicitation and provides notice of its intent to reissue the solicitation, then the rejected proposals or replies remain exempt from public disclosure until such time that the City provides notice of an intended decision concerning the reissued solicitation or until the City withdraws the reissued solicitation. A proposal or reply shall not be exempt from public disclosure longer than twelve (12) months after the City's initial notice rejecting all proposals or replies.
- (b) Upon award recommendation or ten (10) days after opening, bids become "public records" and shall be subject to public disclosure consistent with Chapter 119 (Public Records) and Section 815.045 (Trade Secret Information), Florida Statutes. Should bidders/proposers consider any information related to their proposal or the services to be provided to City to be proprietary, a trade secret, or otherwise constitute confidential material under Florida or federal law, bidder/proposer shall designate such portion of the material as such by clearly marking it as CONFIDENTIAL, PROPRIETARY, or TRADE SECRET and submit both a non-redacted and redacted copy of their submission. The redacted copy shall only exclude or obliterate the exact portions claimed to be confidential, proprietary, or trade secret. Additionally, bidder/proposer shall state the basis for of the exemption that it contends is applicable to the record, to include the statutory citation to an exemption created or afforded by statute.

- (c) **THE CITY WILL MAKE NO EFFORT TO VERIFY WHETHER OR NOT THE REDACTED MATERIAL IS EXEMPT FROM CHAPTER 119, FLORIDA STATUTES. THAT DETERMINATION IS TOTALLY THE RESPONSIBILITY OF THE BIDDER/PROPOSER AND THE BIDDER/PROPOSER SHALL BE SOLELY RESPONSIBLE FOR DEFENDING ITS DETERMINATION THAT THE REDACTED PORTIONS OF ITS RESPONSE ARE CONFIDENTIAL, TRADE SECRET, OR NOT OTHERWISE SUBJECT TO DISCLOSURE. PROPOSER SHALL PROTECT, DEFEND, AND INDEMNIFY THE CITY FOR ANY AND ALL CLAIMS ARISING FROM OR RELATING TO PROPOSER'S DETERMINATION THAT THE REDACTED PORTIONS ARE NOT SUBJECT TO DISCLOSURE. IF THE PROPOSER FAILS TO SUBMIT A REDACTED COPY OF ITS SUBMISSION, ANY CLAIM OF CONFIDENTIALITY IS WAIVED, AND THE CITY SHALL BE AUTHORIZED AND REQUIRED TO PRODUCE THE ENTIRE DOCUMENT OR RECORD IN ITS ANSWER TO A PUBLIC RECORDS REQUEST FOR SAID RECORDS.**

**1.17 ANTI-COLLUSION STATEMENT.** By responding to this Solicitation, Vendor certifies that the following statements are true:

- (a) All information contained herein is part of the public domain as defined in the Public Records Act, Chapter 119, Florida Statutes.
- (b) Proposer's submission is made without prior understanding agreement, or connection with any person, firm, or corporation submitting a bid for the same work, labor, or service to be done or supplies, materials, or equipment to be furnished and is in all respects fair and without collusion or fraud. Proposer understands that collusive bidding is a violation of state and federal law and may result in fines, prison sentences and civil penalties.
- (c) Proposer's submission has been arrived at independently and without consultation, communication, or agreement, or for the purpose of restricting competition, as to any matter relating to such prices with any other Proposer or competitor.
- (d) Unless otherwise required by law, the prices which have been (or will be) quoted by Proposer in this submission have not been knowingly disclosed by Proposer and will not be knowingly disclosed by Proposer, either directly or indirectly, to any other bidder or competitor prior to the Solicitation opening date.

**END OF SECTION**

## SECTION 2 MINIMUM REQUIREMENTS, AND RFP TIMELINE

**2.1. MINIMUM QUALIFICATIONS (PRE-QUALIFICATION REQUIREMENTS).** As part of the selection process, firms must first demonstrate they are qualified to participate in the solicitation process by clearly showing they meet the minimum qualification requirements set forth herein. Proposals submitted by firms must meet the minimum qualifications set forth in this Section in order to be considered:

The proposer shall include qualifications and experience of the firm/individual(s) providing the services. The submission must include:

- (a) **Certification Requirement.** Bidder must process a FCAS and a MAAA to submit a bid for this project.
- (b) **Experience Requirement.** Bidder must possess five (5) years' experience in the actuarial services for government in the State of Florida.
- (c) **Current/past performance in similar activities.** Provide a list of all Florida public agencies for which your company has provided similar services over the last five (5) years. Include in your list:
  - (1) Client (contact person name, title, full address, current telephone number, fax number, and email of a reference within each agency).
  - (2) Period of contract.
  - (3) Dollar value of contract.
  - (4) Services offered and results.

### **2.2. INSURANCE REQUIREMENTS**

**COMMERCIAL AUTO LIABILITY.** Awarded vendor shall procure and maintain for the life of this agreement commercial auto liability insurance with a minimum combined single limit of One Million Dollars (\$1,000,000) per occurrence for bodily injury and property damage arising out of vendor's operations and covering all owned, hired, scheduled, and non-owned automobiles utilized in said operations.

- (a) **COMMERCIAL GENERAL LIABILITY.** Awarded vendor shall procure and maintain for the life of this agreement commercial liability insurance with minimum coverage limits not less than:
  - (1) One Million Dollars (\$1,000,000) per occurrence and Two Million Dollars (\$2,000,000) aggregate (or project aggregate, if a construction project) for bodily injury, property damage, and personal and advertising injury; and
  - (2) One Million Dollars (\$1,000,000) per occurrence and Two Million Dollars (\$2,000,000) aggregate (or project aggregate, if a construction project) for products and completed operations.
  - (3) Policy must include coverage for contractual liability and independent contractors.
- (b) **WORKERS' COMPENSATION AND EMPLOYER'S LIABILITY.** Awarded vendor shall procure and maintain for the life of this agreement adequate workers' compensation and employer's liability insurance covering all of its employees in at least such amounts as required by Chapter 440, Florida Statutes, and all other state and federal workers' compensation laws. Vendor shall ensure any and all subcontractors have the required

coverage for all of their employees as required by applicable law. Vendor shall waive, and shall ensure that its insurance carrier waives, all subrogation rights against the City of Ocala and its officers, employees, and volunteers for all losses or damages.

**(c) SPECIAL INSURANCE REQUIREMENTS:**

(1) **Professional Liability/Errors and Omissions Insurance.** The awarded Vendor shall procure and maintain, for a period of not less than Five (5) Years from the date of this Agreement, a policy of Professional Liability Errors and Omissions Insurance with limits of not less than Two Million Dollars (\$2,000,000) per claim. This insurance must be written by an insurer who possesses an A.M. rating of at least an "A". It is recognized that this type of insurance is only available on a Claims Made basis and Additional Insured endorsements are not available.

(2) **Employee Dishonesty/Fidelity Bond, Inside Money and Securities Coverage.** Awarded vendor shall procure and obtain Employee Dishonesty, Third-Party Fidelity Bond, and Inside Money and Securities coverage for City-owned property in the care, custody or control of the vendor. Coverage limits shall be in an amount not less than One Million Dollars (\$1,000,000). The City of Ocala must be included on the policy as a loss payee.

**(d) CITY AS ADDITIONAL INSURED AND ENDORSEMENTS.** The City of Ocala shall be named as an Additional Insured and Certificate Holder on all liability policies identified in this section with the exception of Workers' Compensation and Professional Liability policies. Awarded vendor's Worker's Compensation policy shall be endorsed with WC 00 03 13 Waiver of our Right to Recover from Others or its equivalent. Vendor's Commercial General Liability policy shall be endorsed with a CG 20 26 04 13 Additional Insured – Designated Person or Organization Endorsement or similar endorsement providing equal or broader Additional Insured Coverage with respect to liabilities arising out of activities performed by or on behalf of vendor.

**(e) FAILURE TO MAINTAIN REQUIRED COVERAGE.** In the event that the awarded vendor fails to obtain or maintain in full force and effect any required insurance coverage, the City may procure same from insurance carriers as the City may deem proper, irrespective that a lesser premium for such insurance coverage may be available, and Vendor shall pay, upon demand by City, any and all premiums, costs, charges and expenses incurred or expended by City in obtaining such insurance. Notwithstanding the foregoing, in the event City is forced to procure the required insurance coverage due to awarded vendor's failure to comply with these Insurance Requirements, City shall in no manner be liable to awarded vendor for any insufficiency or failure of coverage with regard to same or any loss to Vendor occasioned thereby. Additionally, the procurement of such insurance coverage shall not relieve awarded vendor of its obligation to maintain said coverage in the types and amounts specified herein and awarded vendor shall nevertheless hold City harmless from any loss or damage incurred or suffered by City from awarded vendor's failure to maintain said coverage.

**(f) OTHER MISCELLANEOUS INSURANCE PROVISIONS.**

(1) These insurance requirements shall not relieve or limit the liability of awarded vendor. City does not in any way represent that these types or amounts of insurance are sufficient or adequate to protect awarded vendor's interests or liabilities but are merely minimums. No insurance is provided by the City under any contract to cover awarded vendor.

(2) No work shall be commenced under any contract until the required Certificate(s) of Insurance have been provided. Work shall not continue after expiration (or



cancellation) of the Certificates of Insurance and shall not resume until new Certificate(s) of Insurance have been provided. Insurance written on a “Claims Made” form is not acceptable without consultation with City of Ocala Risk Management.

- (3) Awarded vendor shall arrange for its liability insurance to include, or be endorsed to include, a severability of interests/cross-liability provision so that the “City of Ocala” (where named as an additional insured) will be treated as if a separate policy were in existence, but without increasing the policy limits.

**2.3 RFP TIMELINE.** The City will attempt to follow the following schedule in the selection of the successful Proposer. The timeframes set forth below are subject to change at any time in the City’s sole discretion.

Milestone	Date*
Deadline for Solicitation Clarification and Questions	<b>August 13, 2024</b>
Proposal Submission Deadline	<b>August 9, 2024</b>
Administrative Review of Proposals	TBD
Selection Committee Meeting	TBD
Announcement of Advancing Shortlisted Firms	TBD
Oral Presentations by Shortlisted Firms and Interviews (if required)	TBD
Final Scoring/Ranking and Posting of Recommended Firm	TBD
Contract Preparation and Negotiations	TBD
City Council Award and Approval Date	TBD
Contract Execution	TBD

**\*The City reserves the right to make changes or alterations to the Time Schedule at any time as the City, in its sole discretion, deems to be in the best interest of the public. Any extension, change, or update to this schedule prior to project award shall be updated within the listing at [www.bidocala.com](http://www.bidocala.com). Proposers are responsible for verifying all listing information prior to submitting a response to this solicitation.**

**END OF SECTION**

**SECTION 3**  
**SCOPE OF WORK FOR CASUALTY ACTUARIAL SERVICES**

**3.1. BACKGROUND INFORMATION**

The City of Ocala (the “City”) seeks proposals from qualified and experienced Casualty Actuarial Services firms. Proposals shall be made on the basis of and shall meet or exceed the requirements contained herein. The actuary shall provide the City with a reasonable projection of loss costs, cash flows, incurred but not reported (IBNR) costs, and the information necessary for the City to comply with requirements of (GASB) Rule 10, for financial reporting purposes.

The City of Ocala, incorporated in 1885, is the largest municipality located in Marion County. The City has a Council/Manager form of government. Voters elect a five-member City Council with four members elected by district and one member at-large to serve a four-year term. The Mayor is elected at-large to serve a two-year term.

The City Manager is appointed by City Council and serves as the City’s chief administrative officer who is responsible for carrying out policy, administering City affairs, and keeping City Council informed on governmental operations. The daily operations associated with this municipality include public safety (police and fire), electric and fiber utilities, parks and recreational activities, street maintenance, water/wastewater services, stormwater improvements, community development, planning and zoning, and general administration.

**3.2. PROPOSER ‘S RESPONSIBILITIES.**

**The Actuary shall provide, at a minimum, the following:**

(a) **DETERMINATION OF REQUIRED RESERVES:** Provide projections of reserves, ultimate loss, and allocated loss adjustment expenses for each self-insured program. The Vendor shall determine the reserves as required by the GASB Statement 10 as of September 30<sup>th</sup>, 2024 and for each fiscal year moving forward.

The actuarial estimate of required reserves shall be identified by portions attributable to case reserves; IBNR reserves; and allocated loss adjustment methods to determine the ultimate losses and required reserves for each self-insured program.

The actuary shall employ a minimum of two (2) accepted actuarial methods in determining the ultimate losses and required reserves for each self-insured program.

(b) **ACTUARIAL REPORT** This engagement requires the preparation of a written report. The report shall provide a description of the actuarial methods employed and a summary of the assumptions underlying the work. A draft report shall be provided to the City within thirty (30) days of receiving information required for the engagement and the final report shall be delivered to the City within fifteen (15) days of the City agreeing to the draft.

(c) Provide a written actuarial report that complies with GASB rule 10 for financial purposes and any additional GASB rules, as needed.

(d) Complete all work performed under this solicitation in accordance with policies and procedures of the City of Ocala and all applicable State and Federal laws, policies, procedures, and guidelines.

- (e) Data collected by the Vendor shall be in a format compatible with, or easily converted to City's databases. A sequential naming convention should be applied to the files and documentation provided to the city.
- (f) Ensure that all documents prepared under this contract have been prepared on a Windows-based operating system computer using the most current version of Microsoft Office, which includes Word, Excel, Power Point, Access or any other software as specified and approved by City staff.

**3.3. VENDOR EMPLOYEES AND EQUIPMENT**

- (a) Vendor must utilize competent employees in performing the work. Employees performing the work must be properly certified or qualified as required by the scope.
- (b) The Vendor shall provide an assigned Project Manager, who will be the primary point of contact. Vendor must provide a valid telephone number and address at all times to the City Project Manager. The telephone must be answered during normal working hours or voicemail must be available to take a message.
- (c) At the request of the City, the Vendor must replace any incompetent, unfaithful, abusive, or disorderly person in their employment. The City and the Vendor must each be promptly notified by the other of any complaints received.
- (d) Vendor will operate as an independent contractor and not as an agent, representative, partner or employee of the City of Ocala, and shall control their operations at the work site, and be solely responsible for the acts or omissions of their employees.

**3.4. CITY OF OCALA RESPONSIBILITIES**

- (a) The City of Ocala will furnish the following services/data to the Vendor for the performance of services:

- (1) Provide all necessary reports and data needed to complete actuarial services.

**3.5. INVOICING**

- (a) All original invoices will be sent to: City of Ocala, Finance Department, 201 SE 3rd Street, Ocala, FL 34471, email: [MHughes@ocalafl.gov](mailto:MHughes@ocalafl.gov).
- (b) Vendor will invoice at least once a month.

**END OF SECTION**

## SECTION 4

### SUBMISSION INSTRUCTIONS, PROPOSAL ORGANIZATION REQUIREMENTS, AND EVALUATION CRITERIA

- 4.1. Proposers shall follow the submittal requirements set forth herein. Responses that do not adhere to the following format or which fail to include the requested information/documents may be considered non-responsive and therefore ineligible for award. The City reserves the right to seek additional/supplemental information as needed.
- 4.2. **PROPOSAL SUBMISSION INFORMATION AND DEADLINE.** All Proposals must be electronically submitted via before 2:00 p.m. (EST) on the listing end date/bid close date identified at [www.bidocala.com](http://www.bidocala.com). Proposals received after this time and date will not be considered. **Proposals may not be submitted by any other means.** The City will not accept Proposals sent by U.S. Mail, couriers, fax, or e-mail.
- (a) Sealed electronic Proposals will be received and opened by the City's Procurement and Contracting Department electronically via the City's e-procurement portal. All submitted responses shall be time and date stamped at the time the documents are uploaded and received.
- (b) Any Proposals received after the advertised deadline for submissions will not be considered. It is the sole responsibility of each Proposer to ensure Proposal is submitted via the e-procurement portal on or before the advertised deadline.
- (c) The ProRFx timestamp shall be conclusive proof of the timeliness of submission.
- (d) By submitting a response, the Proposer certifies that neither Proposer nor any principal of Proposer is presently disbarred, suspended, proposed for debarment, declared ineligible, or otherwise excluded from doing business with any government agency (local, state, or federal).
- (e) No Proposer shall be permitted to submit multiple solicitation responses. Only one (1) submission per firm, corporation, or individual bidder shall be accepted (as corroborated by maintaining distinct financial books, corporate tax filings, and EINs).
- (f) Proposals failing to provide sufficient information and assurances of performance so as to permit the City to accurately assess each category of the required services will be deemed non-responsive and will not be given further consideration.
- (g) Proposers shall examine the solicitation and contract documents and before submitting a bid, shall make a written request to City for an interpretation or correction of any ambiguity, inconsistency, or error therein which could have been discovered by a Proposer. At the Proposal opening each Proposer shall be presumed to have read and be familiar with the contract documents.
- 4.3. **COVER PAGE, PAGE SIZE, AND FORMAT.**
- Proposals shall contain 8 ½" x 11" pages only with a minimum font size of 11 points. Proposals shall be no more than forty (20) pages, excluding the cover page, transmittal letter, and any required attachments, forms, licenses, certifications, sample reports, or resumes.
- The cover page shall include the title of this Solicitation along with the Proposer's firm name, address, contact person, telephone number, and e-mail address.
- 4.4. **ORGANIZATION OF PROPOSAL.** Proposers shall organize submittals in the following format with tabs separating each section.
- (a) **TRANSMITTAL LETTER.** A transmittal letter must accompany the submittal and must be signed by an individual legally empowered to represent and bind the proposing firm. The transmittal letter must, at minimum, include the following information:

- (1) Corporate name (if applicable), address and telephone number of principal office, number of years in business and staff size.
- (2) Identify the individual that will be primarily responsible for overseeing the completion of this project on behalf of the firm and the names of the persons who will be authorized to make representations for the firm, their titles, addresses, and phone numbers.
- (3) Include an affirmative statement that the firm has received, read and understands all procedures and criteria associated with the submittal requirements, and understands that all terms and conditions contained herein may be incorporated into a resulting contract.
- (4) A short narrative describing the firm's understanding of the scope of work and a brief statement of why the firm believes itself to be the best qualified to perform the engagement.
- (5) **Include an affirmative statement that the firm and the key personnel to be assigned to the engagement are legally qualified and properly certified to provide casualty actuarial services as requested, within the State of Florida.**

**(b) TAB 1 – QUALIFICATIONS, BACKGROUND AND EXPERIENCE.**

*Anyone submitting a proposal must have been providing these services for a minimum of five (5) years in the State of Florida. The proposer shall include qualifications and experience of the firm/individual(s) providing the services. The submission must include:*

- (1) Brief history and organizational structure of your firm. Indicate home office location, local office, office handling account, office hours, number of employees, etc.
- (2) Please list any potential conflicts of interest. In the proposer's own words, describe the potential conflict of interest providing as much detail as possible. It is not sufficient to refer the City to proposer's website.
- (3) A list of staff, their positions and years of experience. Identify the individual(s) who will be assigned to provide services and provide a detailed resume(s) including similar successes using Ocala's requirements.
- (4) Address the priority of the project regarding staff availability, indicate ability and commitment in ensuring the project or services will be performed in a timely fashion and completed on time. Provide a listing of current and projected workload.
- (5) Current/past performance in similar activities. Provide a list of all Florida public agencies for which your company has provided similar services over the last five (5) years. Include in your list:
  - Client (contact person name, title, full address, current telephone number, fax number, and email of a reference within each agency).
  - Period of contract.
  - Dollar value of contract.

- Services offered and results.

**(c) TAB 2 – SCOPE OF SERVICE, PROJECT UNDERSTANDING, PROPOSED APPROACH AND METHODOLOGY**

*Describe your understanding of the project and detailed approach to performing the contracted work as indicated in the scope of services which would best serve the City of Ocala's needs. This should include, but not be limited to, the following points:*

- (1) Define what services your company is proposing to best serve the City of Ocala's needs. State your project plan, your firm's interpretation of scope and method of approach. Provide a detailed outline of the tasks associated with each element of the scope of services described above, including any additional tasks that the proposer may choose to identify and describe.
- (2) Describe any performance measures offered.
- (3) Identify any tasks that proposer is expecting City to perform.

**(d) TAB 3 – PRICE PROPOSAL.**

- (1) Each firm must submit a firm, fixed annual fee amount for any and all services and expenses utilizing Exhibit A- Price Proposal. This fee should be full compensation for the Consultant's professional services and shall include any and all travel required by the consultant to meet with City staff as outlined in the Scope of Service and the proposer's approach and methodology. Payment will be made upon completion of the work outlined in the Scope of Service.
- (2) Expense Reimbursement: No additional reimbursement for expenses incurred by the Consultant will be paid by the City including, but not limited to the following: consultant travel, advertising, printing, binding, postage, and delivery, clerical, and long distance telephone charges.
- (3) Compensation for Additional Services: In the event the City required services in addition to those described above or request any changes resulting in additional services, the Consultant shall be compensated at an hourly rate pursuant to an agreed hourly rate.
- (4) The City reserves the right to negotiate prices with the selected Casualty Actuarial Services Provider.

**4.5. EVALUATION PROCESS AND CRITERIA.** The City desires to maximize the purchasing value of public funds. It is the intention of the City to award the contract to the most qualified, responsive, responsible firm, which may not necessarily be the lowest-price proposer. Best value evaluation determines the value of products and/or services acquired resulting in the best combinations of quality, service, time, safety, security, and cost considerations over the useful life of the product or service. The emphasis shall be qualifications and value over price.

**4.6.** The City desires to maximize the purchasing value of public funds. It is the intention of the City to award the contract to the most qualified, responsive, responsible firm, which may not

necessarily be the lowest-price proposer. Best value evaluation determines the value of products and/or services acquired resulting in the best combinations of quality, service, time, safety, security, and cost considerations over the useful life of the product or service. The emphasis shall be qualifications and value over price.

**4.7. SELECTION COMMITTEE.** The Selection Committee for this Solicitation will be comprised of a minimum of three (3) members, from various and appropriate City departments.

(a) **ADMINISTRATIVE REVIEW OF PROPOSALS.** Procurement and Contracting staff shall first review all Proposals in detail to make a determination as to the responsiveness of each Proposer:

- (1) A proposal will be deemed responsive where it complies with the requirements as set forth in this solicitation, including the submission of all required documentation in the format outlined by this Solicitation.
- (2) If a proposal is found to be inadequate with regard to any of the requirements set forth in this solicitation, the City's Procurement and Contracting Officer, in his/her sole discretion, shall make a determination as to whether or not the deficiency can fairly be corrected or if the Proposal should be rejected and found to be non-responsive.
- (3) If a proposer fails to meet and provide documentation in support of each of the Minimum Qualifications requirements set forth in this Solicitation, the Proposer's proposal will be rejected and removed from consideration.
- (4) Only responsive proposals from responsible Proposers shall be submitted to the **Casualty Actuarial Services** Selection Committee

(b) **SELECTION COMMITTEE REVIEW AND EVALUATION CRITERIA.** Responsive and timely received proposals from responsible firms will be evaluated by the Selection Committee on a fair and consistent basis according to the evaluation criteria set forth below. If oral interviews and presentations are determined to be necessary, final scoring will be conducted after the interviews.

- (1) The Selection Committee shall review each proposal individually and score each proposal based on the evaluation criteria stated herein.
- (2) During the formal Selection Committee meeting, Committee members will discuss the proposals and compile individual rankings for each proposal based on the evaluation criteria stated herein to determine a shortlist consisting of not less than three (3) of the highest-ranking firms. If fewer than three firms respond to the RFP or are otherwise found to be qualified, the Selection Committee members shall shortlist such firms as it deems to be most highly qualified. The Selection Committee meeting shall be formally noticed by e-notification and posting on the City of Ocala website.
- (3) The Selection Committee may schedule oral presentations from the top-ranked firms, and may, at their discretion, obtain guidance from third-party subject matter experts. Dates will be set for conducting interviews or presentations with shortlisted firms, and notification will be sent by e-mail and/or telephone of their assigned date and time, by Procurement staff.
- (4) Final recommendation will be decided based on a review of scores and a consensus of the Selection Committee.

- (5) The City reserves the right to withdraw this Solicitation and reject any or all proposers at any time and for any reason, and to issue such clarifications, modifications, and/or amendments as it may deem appropriate.
- (6) **Evaluation Criteria.**

SELECTION COMMITTEE EVALUATION CRITERIA	SCORING (100 POINTS)
<b>QUALIFICATIONS, EXPERIENCE AND REFERENCES.</b> <ul style="list-style-type: none"> <li>▪ Experience of firm.</li> <li>▪ Qualifications and experience of assigned staff.</li> <li>▪ Licensing.</li> <li>▪ References</li> </ul>	<b>40</b>
<b>SCOPE OF SERVICE, PROJECT UNDERSTANDING, PROPOSED APPROACH AND METHODOLOGY</b> <ul style="list-style-type: none"> <li>▪ Understanding and commitment to scope of service.</li> <li>▪ Payment administration.</li> <li>▪ Performance guarantees.</li> <li>▪</li> </ul>	<b>35</b>
<b>PRICE PROPOSAL</b> <ul style="list-style-type: none"> <li>▪ Cost of proposed services.</li> <li>▪ Proposed rate guarantee period.</li> </ul>	<b>25</b>
<ul style="list-style-type: none"> <li>▪ <b>Total Maximum Points</b></li> </ul>	<b>100</b>

- (c) **NEGOTIATION AND INTENT TO AWARD.** After the shortlisted firms have been ranked based upon evaluation criteria, the City will issue its Intent to Award and engage in negotiations for the development of a professional services contract starting with the highest-ranked Proposer after the conclusion of the protest period. In the event that City is unable to negotiate a contract with the highest-ranked Proposer, such negotiations will be terminated and negotiations will commence with the next highest-ranked Proposer, and so forth, until a contract is negotiated or the City rejects all Proposals and terminates the solicitation.
- (1) Negotiation meetings will be conducted in Ocala, Florida and the City will distribute instructions and/or agendas in advance of each negotiation session. Representatives for the Proposer should plan to be available, without interruptions, for the entirety of the scheduled negotiation meeting.
  - (2) Negotiations will not be open to the public, but will be recorded pursuant to Section 286.0113, Florida Statutes. The recorded sessions and any records presented at the meeting will remain exempt from Florida Public Records until such times as the City provides notice of an intended decision or until thirty (30) days after the final reply, whichever occurs first. Provided, however, if the information provided at the meeting is deemed to be material to the Solicitation, then an addendum will be issued to all responders.
  - (3) After the successful negotiation of a professional services contract, the City will present the resulting contract to City Council for approval. City Council may



approve the recommended award and negotiated contract or reject the award and contract. The decision of City Council shall be final.

#### **4.8. CONTRACT AWARD.**

- (a) City anticipates award to the firm who submits a Proposal judged by the **Casualty Actuarial Services** Selection Committee to be the most advantageous to the City.
- (b) Proposer understands that by submitting a response to a solicitation does not constitute an agreement or a contract with the City.
- (c) In the event of a default by the awarded vendor, City reserves the right to utilize the next highest ranked Proposer meeting specifications as the new awarded Vendor. In the event of this occurrence, the next highest ranked Proposer meeting specifications shall be required to provide the goods or services at the prices as contained on their Proposal or bid for this specification.
- (d) The contract that the City expects to award as a result of this Solicitation will be based upon the Solicitation documents, Vendor's final response to the Solicitation as accepted by the City, and the City of Ocala's General Terms and Conditions and any Special Terms and Conditions attached to the advertised Solicitation.

#### **4.9. ADDITIONAL INFORMATION.**

- (a) **Offer and Binding Authority.** Each Proposal timely received by City at the time advertised for the bid opening shall constitute an offer by the Proposer to sell the goods and/or perform the services in strict accordance with the terms and conditions set forth in the solicitation, all for the bid amount. The individual submitting the Proposal must, and shall be deemed to, have binding authority to submit contracts on behalf of the responding firm.
- (b) **Determination of Responsiveness and Responsibility.** After Proposal opening, but before any award is made, the City shall evaluate (as applicable) the solicitation process, the bid total, any supplements to the Proposal submittal forms, Proposer experience, any proposed subcontractors and/or equipment manufacturers, Proposer's past performance and references, and any other data deemed by the City to be relative to making a determination of Proposer's responsibility and qualifications to perform satisfactorily under the resulting contract.
- (c) **Mistakes.** Proposers are expected to examine the specifications, delivery schedule, bid prices, extensions, and all instruction pertaining to the solicitation. Failure to do so shall be at Proposer's risk and expense. All extensions of the unit prices shown, and the subsequent addition of extended amounts, shall be verified by City. In the event of a discrepancy between the sum of the extended amounts and the bid total, the unit price shall govern (if applicable). The City reserves the right to add to or delete any item from a bid or resulting award when deemed to be in the best interest of the City.
- (d) **Subcontractors and Equipment Manufacturers.** Proposer may be required to submit, in writing, the names and addresses (and other material information) for any proposed subcontractors or equipment manufacturers identified in the Proposal. City reserves the right to disapprove any proposed subcontractor or equipment manufacturers whose technical or financial ability, resources, or experience are deemed (in the City's sole discretion) to be inadequate.

- (e) **Samples.** Samples of items when required, must be furnished free of expense to City and upon request, be returned to the bidder at the bidder's expense. Samples of selected items may be retained for comparison purposes.
- (f) **Right to Cancellation, Rejection, Disqualification, and Waiver.** City reserves the right to reject any bid where the prices appear to be unbalanced, and to reject any or all bids, or parts thereof, if it determines, in its sole discretion, that such rejection is in the best interest of the City. City reserves the right to cancel the bid in its entirety or waive any minor irregularity or technicality in bids received.
- (g) **Sole Proposer.** Where only a single responsible and responsive Proposal is received, City may, in its sole discretion, elect to conduct a price or cost analysis of the Proposal. Such Proposer shall cooperate with the City's analysis and provide such supplemental information as may be required. The determination whether to enter into an agreement with a sole Proposer shall be solely within the City's discretion and shall not be conditioned upon the City's performance of a price or cost analysis.
- (h) **Shortlisting and Oral Presentations.** In general, City wishes to avoid the expense (to the City and to proposing firms) of unnecessary presentations. Therefore, City will make every reasonable effort to rank/select firms based on written submittals alone. If no single top-ranked firm can be clearly identified by review of the written submittals alone, the City may shortlist Proposals and require those Proposers to make oral presentations, participate in interviews, or answer questions. These presentations, interviews, and questions will provide Proposers with an opportunity to demonstrate their qualifications, approach to the project, and ability to furnish the required services. City reserves the right in all instances to conduct personal interviews or require presentations of any or all Proposers prior to selection. City shall not be liable for any costs incurred by Proposers in connection with personal interviews or presentations (i.e., travel, accommodations).
- (i) **City's Selection Committee.** City's selection committee may consist of representatives from the City of Ocala, City Council members, and/or the Mayor. City reserves the right to adjust the makeup of the selection committee. Evaluation criteria and selection schedules will be announced either within the solicitation documents or with the posting of a Public Notice.

**4.10. CONTRACT TERMS AND CONDITIONS.** Please review the City's General Terms and Conditions prior to submitting a response to this Solicitation and expect for them to be included in any award resulting from this Solicitation. By submitting a response, Proposer acknowledges its acceptance of the Solicitation specifications, the City of Ocala's General Terms and Conditions, and any Special Terms and Conditions attached hereto without modification unless expressly stated in the submitted offer. If Proposer takes exception to any provision, Proposer must state the reason for the exception and state the specific contract language it proposes to include in place of the provision and upload said exceptions as part of Proposer's response to this Solicitation.

**4.11. RIGHT TO PROTEST.** Any actual bidder or offeror that has submitted a Proposal for a particular procurement and is aggrieved in connection with the solicitation or award of the contract must protest in writing in compliance with the City of Ocala's Procurement Policy found at [www.bidocala.com](http://www.bidocala.com).

**END OF SECTION**