



Procurement Management Department
2115 Second Street, 1st Floor
Fort Myers, FL 33901
Main Line: (239) 533-8881
Fax Line: (239) 485-8383
www.leegov.com/procurement

Posted Date: March 1, 2022

Solicitation No.: RFP220125CJV

Solicitation Name: Insurance Broker/Agent: All Lines

Subject: Addendum Number 1

The following represents clarification, additions, deletions, and/or modifications to the above referenced bid. This addendum shall hereafter be regarded as part of the solicitation. Items not referenced herein remain unchanged, including the response date. Words, phrases or sentences with a strikethrough represent deletions to the original solicitation. Underlined words and bolded, phrases or sentences represent additions to the original solicitation.

1. DELETE

- a. From page 20 SUBMITTAL REQUIREMENTS & EVALUATION CRITERIA

TAB 6: Local Vendor Preference

2 ADD

- a. To page 20 SUBMITTAL REQUIREMENTS & EVALUATION CRITERIA

TAB 6: Local Vendor Preference

- If applicable, provide documentation supporting your firm's physical business address located within the boundaries of Lee County, Florida; having at least two (2) fulltime employees in Lee County; and a Local Business Tax Receipt issued by Lee County at least one year prior to solicitation opening.
- All qualified local vendors will be awarded five (5) points out of a possible one hundred (100) point score.

BIDDER/PROPOSER IS ADVISED, YOU ARE REQUIRED TO ACKNOWLEDGE RECEIPT OF THIS ADDENDUM WHEN SUBMITTING A BID/PROPOSAL. FAILURE TO COMPLY WITH THIS REQUIREMENT MAY RESULT IN THE BIDDER/PROPOSER BEING CONSIDERED NON-RESPONSIVE.

ALL OTHER TERMS AND CONDITIONS OF THE SOLICITATION DOCUMENTS ARE AND SHALL REMAIN THE SAME.

Christy VanAllen

Christy VanAllen, Procurement Analyst
Direct Line: 239-533-8839
Lee County Procurement Management



Posted Date: March 14, 2022

Solicitation No.: RFP220125CJV

Solicitation Name: Insurance Broker/Agent: All Lines

Subject: Addendum Number 2

The following represents clarification, additions, deletions, and/or modifications to the above referenced bid. This addendum shall hereafter be regarded as part of the solicitation. Items not referenced herein remain unchanged, including the response date. Words, phrases or sentences with a strikethrough represent deletions to the original solicitation. Underlined words and bolded, phrases or sentences represent additions to the original solicitation.

1. ATTACHMENTS:

- a. Add 2 Attachment A 2022 Renewals (02.03.2022)
- b. Add 2 Attachment B Lee BOCC Property Schedule 21-22 (Summary)
- c. Add 2 Attachment C REVISED Form 1
- d. Add 2 Attachment D REVISED Sealed Proposal Label

2. QUESTIONS/ANSWERS

1.	Does the tab 5 pricing page count towards total page count?
Answer	Yes, pricing proposal is subject to page count restriction.
2.	Does the tab 6 Local Preference documentation count towards total page count?
Answer	Page count restriction excludes required forms. Form 5 – Affidavit of Principal Place of Business is a required form. Additionally, resumes are not subject to page count restriction.
3.	Please provide a copy of property schedule, including a statement of values.
Answer	See attachment B Lee BOCC Property Schedule 21-22 (Summary)
4.	Please provide a copy of all current flood policies.
Answer	See attachment A 2022 Renewals
5.	We do not see that it specifies if all references must be public. Please advise if we can use private sector clients as references.
Answer	References shall be for projects of similar scope and size to that being requested in this solicitation. References are not required to be from public sector projects.
6.	On “Form 1- Solicitation Response Form” the deadline date is pre-filled with “3/16/2022” however, the RFP submission schedule shows the submission deadline as 3/31/2022. Please clarify what the date of final submission is.

Answer	Proposals are due March 31, 2022. Please use Attachment C Revised Form 1 and Attachment D Revised Sealed Proposal Label when submitting your proposal.
7.	Do the 3 reference forms that are to be completed by the reference, count towards total page count?
Answer	Page count restriction excludes required forms. Form 3 – Reference Survey is a required form.

BIDDER/PROPOSER IS ADVISED, YOU ARE REQUIRED TO ACKNOWLEDGE RECEIPT OF THIS ADDENDUM WHEN SUBMITTING A BID/PROPOSAL. FAILURE TO COMPLY WITH THIS REQUIREMENT MAY RESULT IN THE BIDDER/PROPOSER BEING CONSIDERED NON-RESPONSIVE.

ALL OTHER TERMS AND CONDITIONS OF THE SOLICITATION DOCUMENTS ARE AND SHALL REMAIN THE SAME.

Christy VanAllen

Christy VanAllen, Procurement Analyst
 Direct Line: 239-533-8839
 Lee County Procurement Management

Cut along the outer border and affix this label to your sealed solicitation envelope to identify it as a “Sealed Submission/Proposal”.

PROPOSAL DOCUMENTS • DO NOT OPEN	
SOLICITATION No.:	RFP220125CJV
SOLICITATION TITLE:	Insurance Broker/Agent: All Lines
DATE DUE:	Thursday, March 31, 2022
TIME DUE:	Prior to: 2:30 PM
SUBMITTED BY:	_____ (Name of Company)
e-mail address	Telephone
DELIVER TO:	Lee County Procurement Management 2115 Second Street, 1st Floor Fort Myers FL 33901
<i>Note: proposals received after the time and date above will not be accepted.</i>	



***Notice: the Date Due/Submission Deadline Date/Opening Date as stated on this label and other forms contained herein may have been updated via issuance of Addenda against this project. It is the sole responsibility of the Contractor/Vendor to monitor the County project webpage for any updates to the Date Due/Submission Deadline Date/Opening Date via Addenda. This label nor other original forms may not be updated. Contractor/Vendor may strike through and update Date Due/Submission Deadline Date/Opening Date at their discretion to match any updates to this date that have been published via Addenda.**

Submission received after the time and date of the Date Due/Submission Deadline Date/Opening Date will not be accepted at the sole discretion of the County.

PLEASE PRINT CLEARLY

REVISED Form 1 – Solicitation Response Form



LEE COUNTY PROCUREMENT MANAGEMENT
SOLICITATION RESPONSE FORM

Date Submitted: _____ Deadline Date: 3/31/2022

SOLICITATION IDENTIFICATION: RFP220125CJV

SOLICITATION NAME: Insurance Broker/Agent: All Lines

COMPANY NAME: _____

NAME & TITLE: (TYPED OR PRINTED) _____

BUSINESS ADDRESS: (PHYSICAL _____

CORPORATE OR MAILING ADDRESS: _____

[] SAME AS PHYSICAL

ADDRESS MUST MATCH SUNBIZ.ORG _____

E-MAIL ADDRESS: _____

PHONE NUMBER: _____ FAX NUMBER: _____

NOTE REQUIREMENT: IT IS THE SOLE RESPONSIBILITY OF THE VENDOR TO CHECK LEE COUNTY PROCUREMENT MANAGEMENT WEB SITE FOR ANY ADDENDA ISSUED FOR THIS PROJECT. THE COUNTY WILL POST ADDENDA TO THIS WEB PAGE, BUT WILL NOT NOTIFY.

In submitting this proposal, Proposer makes all representations required by the instructions to Proposer and further warrants and represents that: Proposer has examined copies of all the solicitation documents and the following addenda:

No. _____ Dated: _____ No. _____ Dated: _____ No. _____ Dated: _____
No. _____ Dated: _____ No. _____ Dated: _____ No. _____ Dated: _____

Tax Payer Identification Number: _____

(1) Employer Identification Number -OR- (2) Social Security Number:

** Lee County collects your social security number for tax reporting purposes only

Please submit a copy of your registration from the website www.sunbiz.org establishing the Proposer/firm as authorized (including authorized representatives) to conduct business in the State of Florida, as provided by the Florida Department of State, Division of Corporations.

1 Collusion Statement: Lee County, Florida The undersigned, as Proposer, hereby declares that no person or other persons, other than the undersigned, are interested in this solicitation as Principal, and that this solicitation is submitted without collusion with others; and that we have carefully read and examined the specifications or scope of work, and with full knowledge of all conditions under which the services herein is contemplated must be furnished, hereby propose and agree to furnish this service according to the requirements set out in the solicitation documents, specifications or scope of work for said service for the prices as listed on the county provided price sheet or (CCNA) agree to negotiate prices in good faith if a contract is awarded.

2 Scrutinized Companies Certification: Section 287.135, FL § , prohibits agencies from contracting with companies, for goods or services over \$1,000,000, that are on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List. Both lists are created pursuant to section 215.473, FL§. As the person authorized to sign on behalf of Respondent, I hereby certify that the company identified above not listed on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List. I understand that pursuant to section 287.135, FL§, the submission of a false certification may subject company to civil penalties, attorney’s fees, and/or costs.

REVISED Form#1 – Solicitation Form, Page 2

3 Business Relationship Disclosure Requirement: Sections 112.313(3) and 112.313(7), FL§, prohibit certain business relationships on the part of public officers and employees, their spouses, and their children. See Part III, Chapter 112, FL § and/or the brochure entitled "A Guide to the Sunshine Amendment and Code of Ethics for Public Officers, Candidates and Employees" for more details on these prohibitions. However, Section 112.313(12), FL § (1983), provides certain limited exemptions to the above-referenced prohibitions, including one where the business is awarded under a system of sealed, competitive bidding; the public official has exerted no influence on bid negotiations or specifications; and where disclosure is made, prior to or at the time of the submission of the bid, of the official's or his spouse's or child's interest and the nature of the intended business. The Commission on Ethics has promulgated this form for such disclosure, if and when applicable to a public officer or employee.
If this disclosure is applicable request form "INTEREST IN COMPETITIVE BID FOR PUBLIC BUSINESS" (Required by 112.313(12)(b), Florida Statute (1983)) to be completed and returned with solicitation response. It is the proposer's responsibility to disclose this relationship, failure to do so could result in being declared non-responsive.

Business Relationship Applicable (request form) **Business Relationship NOT Applicable**

4 Disadvantaged, Minority, Women, Veterans Business Enterprise (DBE, MBE, WBE, VBE) **Yes** **No**
Proposer? If yes, please attach a current certificate.

ALL PROPOSALS MUST BE EXECUTED BY AN AUTHORIZED AUTHORITY OF THE PROPOSER. WITNESSED AND SEALED (IF APPLICABLE)

Company Name (Name printed or typed)



(Affix Corporate Seal, if applicable)

Authorized Representative Name (printed or typed)

Authorized Representative's Title (printed or typed)

Witnessed/Attested by: (Witness/Secretary name and title printed or typed)

Authorized Representative's Signature

Witness/Secretary Signature

Any blank spaces on the form(s), qualifying notes or exceptions, counter offers, lack of required submittals, or signatures, on County's Form may result in the submission being declared non-responsive by the County.

**LEE COUNTY BOARD OF COUNTY COMMISSIONERS
FLOOD SCHEDULE
2021-2022**

Location #	Location Address	Date	Policy #	Zone / Rated	Building	Contents	Building Deductible	Contents Deductible	2021-2022 Premium	2020-2021 Premium
4	Olga Water Treatment Plant Maintenance Bldg 1450 Werner Drive Alva, FL 33920	2021-22, 01/15	09 1151055945	AE/A07	500,000	385,900	1,250	1,250	6,115	\$ 6,086
5	Olga Water Treatment Plant Ammonia Bldg. 1450 Werner Drive Alva, FL 33920	2021-22, 01/15	09 1151055946	AE/A07	30,300	66,200	1,000	1,000	1,354	\$ 1,342
3	Bonita Beach Restrooms 27964 Hickory Blvd. Bonita Springs, FL 33923	2021-22, 01/15	09 1151055947	VE/VE	121,000	-	2,000	-	2,319	\$ 2,181
2	Olga Water Treatment Plant High Service Pump 1450 Werner Drive Alva, FL 33920	2021-22, 01/15	09 1151055948	AE/A07	108,900	441,000	1,250	1,250	3,639	\$ 3,598
6	Lynn Hall Memorial Park 950 Estero Blvd. Fort Myers Beach, FL	2021-22, 04/26	09 1151242992	A12	110,000	11,000	1,250	1,250	4,375	\$ 12,109
7	Lakes Park Welcome 7330 Gladiolus Rd Fort Myers, FL 33908	2021-22, 06/19	09 1151100914	A10	11,000	-	1,000	-		\$ 389
12	Restroom - North 11831 Bayshore Road North Ft. Myers, FL 33917	2021-22, 08/14	09 1151133804	A07	33,700	-	2,000	-		\$ 761
30	DBE Building 17155 Pine Ridge Rd Ft. Myers Beach, FL 33931	2021-22, 08/14	09 1151133805	A10	500,000	500,000	1,250	1,250		\$ 6,235
21	Pine Island Library 10700 Russell Road Bokeelia, FL 33922	2021-22, 08/14	09 1151133806	A09	399,300	500,000	1,250	1,250		\$ 3,176
20	Community Center 4940 Buckingham Road East Ft. Myers, FL 33905	2021-22, 08/14	09 1151133807	A06	84,400	71,300	1,000	1,000		\$ 814
19	Community Center 2325 S. Olga Drive East Ft. Myers, FL 33905	2021-22, 08/14	09 1151133808	A07	166,400	22,300	1,250	1,250		\$ 1,028
22	Phillips Park Bath House 5675 Sesame Drive Bokeelia, FL 33922	2021-22, 08/14	09 1151133809	A09	87,300	7,000	1,000	1,000		\$ 984
9	L.C. Sheriff's Residence 300 Sea Breeze Boca Grande, FL 33921	2021-22, 08/14	09 1151133810	A10	94,500	-	1,000	-		\$ 610
10	Civic Center - Arena 11831 Bayshore Road North Ft. Myers, FL 33917	2021-22, 08/14	09 1151133811	A07	500,000	500,000	1,250	1,250		\$ 6,235
11	SW Florida Fair Office 11831 Bayshore Road North Ft. Myers, FL 33917	2021-22, 08/14	09 1151133812	A07	84,400	29,900	1,500	1,500		\$ 1,948
14	Restroom - East 11831 Bayshore Road North Ft. Myers, FL 33917	2021-22, 08/14	09 1151133813	A07	33,700	-	1,500	-		\$ 772

**LEE COUNTY BOARD OF COUNTY COMMISSIONERS
FLOOD SCHEDULE
2021-2022**

Location #	Location Address	Date	Policy #	Zone / Rated	Building	Contents	Building Deductible	Contents Deductible	2021-2022 Premium	2020-2021 Premium
13	Restroom - South 11831 Bayshore Road North Ft. Myers, FL 33917	2021-22, 08/14	09 1151133814	A07	33,700	-	1,500	-		\$ 772
15	Restroom - West 11831 Bayshore Road North Ft. Myers, FL 33917	2021-22, 08/14	09 1151133815	A07	33,700	-	1,500	-		\$ 772
16	Civic Center Maintenance 11831 Bayshore Road North Ft. Myers, FL 33917	2021-22, 08/14	09 1151133816	A07	500,000	-	1,250	-		\$ 4,672
17	Exhibition Hall 11831 Bayshore Road North Ft. Myers, FL 33917	2021-22, 08/14	09 1151133817	A07	338,900	-	1,250	-		\$ 3,969
18	Civic Center Club House 11831 Bayshore Road North Ft. Myers, FL 33917	2021-22, 08/14	09 1151133818	A07	137,000	17,100	2,000	2,000		\$ 2,431
23	Phillips Park Concession 5675 Sesame Drive Bokeelia, FL 33922	2021-22, 08/14	09 1151133819	A09	28,700	6,400	2,000	2,000		\$ 853
27	DOT & E Sign Shop 190 Evergreen Road North Ft. Myers, FL 33903	2021-22, 08/14	09 1151133820	A10	27,900	500,000	1,000	1,000		\$ 1,137
28	Library 921 SW 39 Terrace Cape Coral, FL 33914	2021-22, 08/14	09 1151133821	A08	500,000	500,000	1,250	1,250		\$ 1,879
8	Community Center 131 1st Street West Boca Grande, FL 33921	2021-22, 08/14	09 1151133822	A10	500,000	72,500	2,000	2,000		\$ 11,548
24	Matlacha Community Ctr. 2577 Pine Island Road Matlacha, FL 33909	2021-22, 08/14	09 1151133823	A09	118,900	3,900	2,000	2,000		\$ 1,895
26	DOT & E Depot 1190 Evergreen Road North Ft. Myers, FL 33903	2021-22, 08/14	09 1151133824	A10	42,200	191,100	2,000	2,000		\$ 5,267
29	Adm. Thickening 17155 Pine Ridge Rd Ft. Myers Beach, FL 33931	2021-22, 08/14	09 1151133825	A10	399,300	500,000	2,000	2,000		\$ 18,101
33	DOT Depot 170 Park Avenue Boca Grande, FL 33921	2021-22, 08/14	09 1151133827	A10	140,100	22,500	2,000	2,000		\$ 2,599
25	Public Health/Tax Collector 83 Pondella Rd. NE North Ft. Myers, FL 33903	2021-22, 08/14	09 1152136729 00	X	129,600	16,200	1,250	1,250		\$ 2,455
32	Captiva Library 11560 Chapin Lane Captiva, FL 33924	2021-22, 08/14	09 1151133829	V14	-	500,000	-	2,000		\$ 35,236
34	Rutenburg Park Pump House 6480 S. Pointe Blvd Ft. Myers, FL 33907	2021-22, 08/14	09 1151133830	A10	133,100	289,400	1,250	1,250		\$ 2,037
40	Headworks Structure 17155 Pine Ridge Road Ft. Myers, FL 33931	2021-22, 08/14	09 1151133831	A10	290,200	-	1,250	-		\$ 2,655

**LEE COUNTY BOARD OF COUNTY COMMISSIONERS
FLOOD SCHEDULE
2021-2022**

Location #	Location Address	Date	Policy #	Zone / Rated	Building	Contents	Building Deductible	Contents Deductible	2021-2022 Premium	2020-2021 Premium
41	Public Safety Building 14750 Six Mile Cypress Pkwy Ft. Myers, FL 33907	2021-22, 08/14	09 1151133832	A14	500,000	500,000	1,250	1,250		\$ 1,879
37	Lake Park Maintenance Bldg 7330 Gladiolus Drive Ft. Myers, FL 33908	2021-22, 08/14	09 1151268083	A10	66,000	27,000	1,000	1,000		\$ 4,542
39	Flammable Storage Bldg 17155 Pine Ridge Road Ft. Myers, FL 33931	2021-22, 08/14	09 1151268084	A10	7,400	6,100	1,000	1,000		\$ 1,393
38	Bowman Bath 1700 Bowman Beach Rd Sanibal, FL 33957	2021-22, 08/14	09 1151268085	A09	133,100	-	1,250	-		\$ 13,930
35	Lake Park Consession 7330 Gladiolus Drive Ft. Myers, FL 33908	2021-22, 08/14	09 1151268086	A10	135,700	23,200	1,250	1,250		\$ 18,915
36	Sheriff Residence 350 Wheeler Boca Grande, FL 33921	2021-22, 08/14	09 1151270116	A10	110,400	-	1,250	-		\$ 6,240
TOTAL									\$ 17,802	\$ 193,445

LEE COUNTY BOARD OF COUNTY COMMISSIONERS
FLOOD SCHEDULE
2021-2022

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5	Olga Water Treatment Plant Ammonia Bldg. 1450 Werner Drive Alva, FL 33920	2021-22, 01/15	09 1151055946	AE/A07	30,300	66,200	1,000	1,000	1,354	\$ 1,342
3	Bonita Beach Restrooms 27964 Hickory Blvd. Bonita Springs, FL 33923	2021-22, 01/15	09 1151055947	VE/VE	121,000	-	2,000	-	2,319	\$ 2,181
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6	Lynn Hall Memorial Park 950 Estero Blvd. Fort Myers Beach, FL	2021-22, 04/26	09 1151242992	A12	110,000	11,000	1,250	1,250	4,375	\$ 12,109
7	Lakes Park Welcome 7330 Gladiolus Rd Fort Myers, FL 33908	2021-22, 06/19	09 1151100914	A10	11,000	-	1,000	-		\$ 389
12	Restroom - North 11831 Bayshore Road North Ft. Myers, FL 33917	2021-22, 08/14	09 1151133804	A07	33,700	-	2,000	-		\$ 761
30	DBE Building 17155 Pine Ridge Rd Ft. Myers Beach, FL 33931	2021-22, 08/14	09 1151133805	A10	500,000	500,000	1,250	1,250		\$ 6,235
21	Pine Island Library 10700 Russell Road Bokeelia, FL 33922	2021-22, 08/14	09 1151133806	A09	399,300	500,000	1,250	1,250		\$ 3,176
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9	L.C. Sheriff's Residence 300 Sea Breeze Boca Grande, FL 33921	2021-22, 08/14	09 1151133810	A10	94,500	-	1,000	-		\$ 610
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11	SW Florida Fair Office 11831 Bayshore Road North Ft. Myers, FL 33917	2021-22, 08/14	09 1151133812	A07	84,400	29,900	1,500	1,500		\$ 1,948
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LEE COUNTY BOARD OF COUNTY COMMISSIONERS
FLOOD SCHEDULE
2021-2022

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28	Library 921 SW 39 Terrace Cape Coral, FL 33914	2021-22, 08/14	09 1151133821	A08	500,000	500,000	1,250	1,250		\$ 1,879
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29	Adm. Thickening 17155 Pine Ridge Rd Ft. Myers Beach, FL 33931	2021-22, 08/14	09 1151133825	A10	399,300	500,000	2,000	2,000		\$ 18,101
33	DOT Depot 170 Park Avenue Boca Grande, FL 33921	2021-22, 08/14	09 1151133827	A10	140,100	22,500	2,000	2,000		\$ 2,599
25	Public Health/Tax Collector 83 Pondella Rd. NE North Ft. Myers, FL 33903	2021-22, 08/14	09 1152136729 00	X	129,600	16,200	1,250	1,250		\$ 2,455
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LEE COUNTY BOARD OF COUNTY COMMISSIONERS
FLOOD SCHEDULE
2021-2022

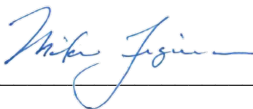
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38	Bowman Bath 1700 Bowman Beach Rd Sanibel, FL 33957	2021-22, 08/14	09 1151268085	A09	133,100	-	1,250	-		\$ 13,930
35	Lake Park Consession 7330 Gladiolus Drive Ft. Myers, FL 33908	2021-22, 08/14	09 1151268086	A10	135,700	23,200	1,250	1,250		\$ 18,915
36	Sheriff Residence 350 Wheeler Boca Grande, FL 33921	2021-22, 08/14	09 1151270116	A10	110,400	-	1,250	-		\$ 6,240
TOTAL									\$ 17,802	\$ 193,445

**LEE COUNTY BOARD OF COUNTY COMMISSIONERS
PROPERTY SUMMARY UPDATED 21-22**

<u>PROPERTY</u>	<u>TOTAL</u>
Buildings including PITO	\$ 791,280,220
Contents including EDP	\$ 248,492,053
Misc. - Street Signs & Traffic Signals	\$ 59,437,000
Property Schedule tab total (all of the above)	\$ 1,099,209,273
Fine Arts Floater	\$ 635,275
Physical Damage Value - Major Equipment	\$ 6,747,032
Physical Damage Values - Licensed for Road Use/Automobiles	\$ 38,013,948
Mechanics Tools	\$ 341,000
Voting Machines and Equipment	\$ 2,107,587
Business Interruption	\$ 1,500,000
Watercraft	\$ 205,000
Grand Total	\$ 1,148,759,116

<u>SUB-LIMITS</u>	
Extra Expense	\$ 5,000,000
Contractor's Materials	\$ 5,000,000
Misc. - CCC & Unnamed Locations	\$ 1,000,000
Misc - Rented Equipment CCC	\$ 1,000,000
<i>sublimited at \$250,000 / \$1,000,000</i>	
Valuable Papers	\$ 1,000,000
Accounts Receivable	\$ 1,000,000
Transit	\$ 400,000

ALL VALUES SUBMITTED ARE CORRECT TO THE BEST OF MY KNOWLEDGE AND REPRESENT THE REPLACEMENT COST VALUES.

Signature: 

Name: Mike Figueroa, Risk Program Manager

Date: March 14, 2022



Procurement Management Department
 2115 Second Street, 1st Floor
 Fort Myers, FL 33901
 Main Line: (239) 533-8881
 Fax Line: (239) 485-8383
www.leegov.com/procurement

Posted Date: March 23, 2022

Solicitation No.: RFP220125CJV

Solicitation Name: Insurance Broker/Agent: All Lines

Subject: Addendum Number 3

The following represents clarification, additions, deletions, and/or modifications to the above referenced bid. This addendum shall hereafter be regarded as part of the solicitation. Items not referenced herein remain unchanged, including the response date. Words, phrases or sentences with a strikethrough represent deletions to the original solicitation. Underlined words and bolded, phrases or sentences represent additions to the original solicitation.

1. QUESTIONS/ANSWERS

1.	Would you please provide a schedule of the County’s current insurance policies, including lines of coverage, carriers, expiration dates, and annual premiums?																																																																																																																				
Answer	<table border="1"> <thead> <tr> <th>Coverage</th> <th>Carrier</th> <th>Expiration</th> <th>Premium</th> </tr> </thead> <tbody> <tr> <td>Accidental Death & Dismemberment</td> <td>Hartford Life (Parks & Rec)</td> <td>08/22/22</td> <td>4,935</td> </tr> <tr> <td>Accidental Death & Dismemberment</td> <td>National Union Fire (Public Safety)</td> <td>10/01/22</td> <td>2,566</td> </tr> <tr> <td>Boiler & Machinery</td> <td>Travelers Property & Casualty</td> <td>10/01/22</td> <td>39,883</td> </tr> <tr> <td>Crime</td> <td>Travelers Casualty & Surety</td> <td>10/01/22</td> <td>10,449</td> </tr> <tr> <td>Cyber Liability</td> <td>ACE American</td> <td>10/01/22</td> <td>67,513</td> </tr> <tr> <td>Excess Casualty (FPL Agreement)</td> <td>Allied World</td> <td>10/01/22</td> <td>159,241</td> </tr> <tr> <td>Excess Casualty (FPL Agreement)</td> <td>HDI Global</td> <td>10/01/22</td> <td>84,527</td> </tr> <tr> <td>Excess Liability & Workers' Comp</td> <td>Safety National Casualty</td> <td>10/01/22</td> <td>529,622</td> </tr> <tr> <td>Flood</td> <td>Wright Flood (39 policies)</td> <td>Various</td> <td>213,973</td> </tr> <tr> <td>License & Permit Bond</td> <td>Travelers Casualty & Surety</td> <td>10/01/22</td> <td>350</td> </tr> <tr> <td>Pollution Liability</td> <td>Indian Harbor</td> <td>10/01/22</td> <td>38,544</td> </tr> <tr> <td>Property</td> <td>Arch Specialty</td> <td>10/01/22</td> <td>267,804</td> </tr> <tr> <td>Property</td> <td>Westchester Surplus Lines</td> <td>10/01/22</td> <td>991,471</td> </tr> <tr> <td>Property</td> <td>Velocity</td> <td>10/01/22</td> <td>200,054</td> </tr> <tr> <td>Property</td> <td>Lloyd's</td> <td>10/01/22</td> <td>425,054</td> </tr> <tr> <td>Property</td> <td>Landmark American</td> <td>10/01/22</td> <td>41,304</td> </tr> <tr> <td>Property</td> <td>Landmark American</td> <td>10/01/22</td> <td>439,254</td> </tr> <tr> <td>Property</td> <td>James River</td> <td>10/01/22</td> <td>41,129</td> </tr> <tr> <td>Property</td> <td>Endurance American Specialty</td> <td>10/01/22</td> <td>377,782</td> </tr> <tr> <td>Property</td> <td>Evanston</td> <td>10/01/22</td> <td>500,054</td> </tr> <tr> <td>Property</td> <td>AXIS Surplus</td> <td>10/01/22</td> <td>74,304</td> </tr> <tr> <td>Property</td> <td>Everest Indemnity</td> <td>10/01/22</td> <td>82,554</td> </tr> <tr> <td>Property</td> <td>Aspen Specialty</td> <td>10/01/22</td> <td>94,554</td> </tr> <tr> <td>Property - Misc. Bridges</td> <td>Westchester Surplus Lines</td> <td>10/01/22</td> <td>318,379</td> </tr> <tr> <td>Property - Misc. Bridges</td> <td>Lexington</td> <td>10/01/22</td> <td>348,608</td> </tr> <tr> <td>Property - Toll Bridges</td> <td>Westchester Surplus Lines</td> <td>10/01/22</td> <td>459,234</td> </tr> <tr> <td>Property - Toll Bridges</td> <td>Lexington</td> <td>10/01/22</td> <td>560,233</td> </tr> <tr> <td>Public Officials Bonds</td> <td>Travelers Casualty & Surety (4-yr Terms)</td> <td>Various</td> <td>2,752</td> </tr> </tbody> </table>	Coverage	Carrier	Expiration	Premium	Accidental Death & Dismemberment	Hartford Life (Parks & Rec)	08/22/22	4,935	Accidental Death & Dismemberment	National Union Fire (Public Safety)	10/01/22	2,566	Boiler & Machinery	Travelers Property & Casualty	10/01/22	39,883	Crime	Travelers Casualty & Surety	10/01/22	10,449	Cyber Liability	ACE American	10/01/22	67,513	Excess Casualty (FPL Agreement)	Allied World	10/01/22	159,241	Excess Casualty (FPL Agreement)	HDI Global	10/01/22	84,527	Excess Liability & Workers' Comp	Safety National Casualty	10/01/22	529,622	Flood	Wright Flood (39 policies)	Various	213,973	License & Permit Bond	Travelers Casualty & Surety	10/01/22	350	Pollution Liability	Indian Harbor	10/01/22	38,544	Property	Arch Specialty	10/01/22	267,804	Property	Westchester Surplus Lines	10/01/22	991,471	Property	Velocity	10/01/22	200,054	Property	Lloyd's	10/01/22	425,054	Property	Landmark American	10/01/22	41,304	Property	Landmark American	10/01/22	439,254	Property	James River	10/01/22	41,129	Property	Endurance American Specialty	10/01/22	377,782	Property	Evanston	10/01/22	500,054	Property	AXIS Surplus	10/01/22	74,304	Property	Everest Indemnity	10/01/22	82,554	Property	Aspen Specialty	10/01/22	94,554	Property - Misc. Bridges	Westchester Surplus Lines	10/01/22	318,379	Property - Misc. Bridges	Lexington	10/01/22	348,608	Property - Toll Bridges	Westchester Surplus Lines	10/01/22	459,234	Property - Toll Bridges	Lexington	10/01/22	560,233	Public Officials Bonds	Travelers Casualty & Surety (4-yr Terms)	Various	2,752
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2.	Would you please provide us with a copy of the current contract for Insurance Broker/Agent All Lines, including remuneration?
Answer	Contract can be found under RFP160297/LKD – Insurance Broker/Agent: All Lines at Lee County’s Procurement Management website https://www.leegov.com/procurement/awarded-annual-contracts/downloads?fid=4819&fn=Project2016-06-09T15_00_02.xml

3.	Would you please provide a copy of the current schedule of assets for property, contents, and inland marine?
Answer	See Addendum 2 Attachment B

4.	Under the current contract for Insurance Broker/Agent All Lines, is remuneration provided as a flat fee, commissions from insurance placements, a combination of both, or some other funding arrangement?
Answer	Flat Fee

BIDDER/PROPOSER IS ADVISED, YOU ARE REQUIRED TO ACKNOWLEDGE RECEIPT OF THIS ADDENDUM WHEN SUBMITTING A BID/PROPOSAL. FAILURE TO COMPLY WITH THIS REQUIREMENT MAY RESULT IN THE BIDDER/PROPOSER BEING CONSIDERED NON-RESPONSIVE.

ALL OTHER TERMS AND CONDITIONS OF THE SOLICITATION DOCUMENTS ARE AND SHALL REMAIN THE SAME.

Christy VanAllen

Christy VanAllen, Procurement Analyst
Direct Line: 239-533-8839
Lee County Procurement Management