



## Request for proposals

### Insurance Broker for the purposes of acquiring health insurance for the Westshore Alliance

#### A. Introduction and Purpose

The Westshore Alliance is a 501(c)6, not-for-profit organization that serves businesses located in and doing business in the Westshore District of Tampa, Florida. The Westshore Alliance was founded in 1983 and represents over 400 businesses. Our mission is to continue the Westshore District's transformation into a premier mixed-use district and cultivate a thriving community for residents and businesses. The Westshore Alliance also serves as the master developer of the Westshore District through a Development of Regional Impact agreement with the City of Tampa and operates the Westshore Special Services District through an agreement with the City of Tampa.

The Westshore Alliance has a small staff but has maintained health insurance coverage for employees. We need a broker who will collaborate with our staff to identify health insurance coverage that provides services at a reasonable cost for our employees and our business.

#### B. Scope of Work

The Westshore Alliance is seeking written proposals from a properly licensed broker or agency to provide services to identify insurers and facilitate the selection of a new health insurance provider by the Westshore Alliance for the year starting January 1, 2024.

The broker or agency shall work on the Westshore Alliance's behalf to secure health insurance coverage for employees, spouses, and dependents. The broker or agency will coordinate the process on behalf of the Westshore Alliance and verify that the options submitted by providers fill the needs of the Westshore Alliance staff. The broker or agency will assist the Westshore Alliance staff in transitioning from the current insurance provider to the new provider by December 31, 2023.

#### C. Submission Requirements

- a. Cover Page
  - i. Please include contact name, title, email address, name of your organization, address, and phone number.
- b. Company Information and Past Experience
  - i. Please include a summary of your work or your agency's work with small businesses (less than 10 employees), non-profit and not-for-profit organizations.
- c. Westshore Alliance membership
  - i. Please note current or previous Westshore Alliance membership, or if the broker or agency has never been a member of the Westshore Alliance.
    1. Membership in the Westshore Alliance is not a prerequisite for selection of a broker or agency. Membership in the Westshore Alliance is not a prerequisite for selection of health insurance provider.
- d. Services Description
  - i. Please indicate your core services, what providers you work with, and schedule of negotiations.
  - ii. Please provide an overview of additional services such as dental and vision, which may be available via your services.
- e. Transition Proposal
  - i. How would you work with staff members and Westshore Alliance executives to allow for a seamless transition between our existing health insurance provider and the new provider?

- f. Exposure Analysis
  - i. Please provide an analysis of all costs and future financial considerations for the health insurance providers that you or your agency would broker with and provide as options for the Westshore Alliance.
- g. Fee Proposal
  - i. Please include your proposed form of compensation, and additional services that may require compensation.
- h. References
  - i. Please include three references with a priority placed on small businesses (less than 10 employees), non-profit and not-for-profit organizations.
- i. Sample Materials
  - i. Please include samples of your work with small businesses (less than 10 employees), non-profit and not-for-profit organizations.
  - ii. Please provide examples of favorable insurance coverage and rates you have secured on behalf of your clients.

**D. Proposal Format**

- a. Proposals shall be organized in the format listed above.

**E. Submission of Proposals and Closing Time**

- a. Proposals must be received by August 14, 2023, by 5:00 PM. Proposals must be in PDF format.
- b. Please submit proposals to:  
Michael Maurino, Executive Director  
Westshore Alliance  
email: [maurino@westshorealliance.org](mailto:maurino@westshorealliance.org)

**F. Proposal Timeline and Evaluation**

- a. RFP for broker/agency released July 24, 2023.
- b. Proposals and submissions must be received by August 14, 2023 at 5 PM
- c. Broker/agency selection made by August 31, 2023 by 5 PM
- d. Broker/agency to provide carrier rates and coverages by September 15, 2023 at 5PM
- e. Westshore Alliance picks carrier by September 29, 2023 at 5 PM
- f. Proposal Evaluation:
  - i. The Westshore Alliance will evaluate all proposals with the intention of retaining cost effective service and maintaining the same or better level of health insurance coverage and care.
  - ii. Brokers and agencies may be asked to participate in follow-up calls prior to the selection of proposals.

**G. Solicitation Terms**

- a. Agreement
  - i. The Westshore Alliance intends to retain the broker or agency for services when needed and maintain their health insurance provider on an annual basis until a time when it becomes not viable to maintain the agreement.
- b. Discretion
  - i. The Westshore Alliance, at its sole discretion, may choose not to issue any agreement with any agency or broker.
- c. Offers/Quotations
  - i. Prices must be inclusive of all costs, including taxes and fees. Coverage quotes must be inclusive of all costs, including taxes and fees. Prices must remain valid for up to 90 days after submission.
- d. Proposal Costs
  - i. There is no reimbursement for costs associated with these submissions.