

**Project Manager:** Allison Lee

**Project Manager's Title:** Administrative Services Coordinator

**Project Contact Email:** alee@snldistrict.org

**RFP #:** 18-05

**RFP Name:** General, Liability and Worker's Compensation Insurance

**Advertising Dates:** 5/18/18 & 5/25/18

**Bid Opening Date:** June 7, 2018

**Bid Opening Time:** 2:00pm

**Proposal Originals Needed:** One (1)

**Proposal Copies Needed:** Three (3)

**RFAI Due Date:** May 28, 2018

**Addendum Date:** May 31, 2018

**Liquidated Damages Written and (#): One Hundred Dollars (\$100.00)**

**Date:** 05/03/2018

## REQUEST FOR PROPOSALS

Sun 'n Lake of Sebring  
Allison Lee, Administrative Services Coordinator  
5306 Sun 'n Lake Blvd.  
Sebring, FL 33872  
e-mail: alee@snldistrict.org  
Facsimile Number: 863-382-2014

RFP NO. 18-05  
OPENING TIME: 2:00pm  
OPENING DATE: June 7, 2018

**THIS IS NOT AN ORDER**

**YOU ARE INVITED TO PROPOSE ON THE FOLLOWING:**

### **Sun 'n Lake of Sebring Improvement District**

**General, Liability and Worker's Compensation Insurance**

The complete set of proposal documents is available on the District web site at [www.snldistrict.org](http://www.snldistrict.org) or call 863-382-2196

**Proposals must be received in the District Office before:**

**Time: 2:00pm Date: June 7, 2018**

State of Florida Tax Exemption Number is  
85-8012528797C-8

Signed: Tanya Cannady, General Manager

Date: 05/03/2018

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**Items in bold are required to be returned with proposal submittal.**

**LEGAL AD**  
**REQUEST FOR PROPOSAL**

Sun 'n Lake of Sebring  
Allison Lee, Administrative Services Coordinator  
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Date: 05/03/2018

ADVERTISE 5/18/18 & 5/25/18  
HIGHLANDS NEWS SUN, ORLANDO SENTINEL

## **GENERAL CONDITIONS**

**PROPOSAL:** To insure acceptance of the proposal, follow these instructions.

**SEALED PROPOSALS:** All Proposals must be submitted in a sealed package. The submitted proposal will contain One (1) original and Three (3) marked copies. The face of the package will contain the date and time of the proposal opening and the proposal number. Proposals not submitted on the District's forms may be rejected. All proposals are subject to the conditions specified herein and on any attached sheets, specifications, special conditions or vendor notes. Any changes to the proposal document must be in ink and must be initialed.

**PROPOSAL OPENING:** Shall be on the date and at the time specified in the proposal documents. It is the proposer's responsibility to assure that their proposal is delivered at the proper time and place of the proposal opening. Proposals which for any reason are not so delivered shall be returned to the proposer unopened. Offers by telephone or facsimile cannot be accepted.

**CONFLICT OF INTEREST:** The award hereunder is subject to Chapter 112, Florida Statutes. All proposers must disclose with their proposal the name of any officer, director or agent who is also an employee of the District. Further, all proposers must disclose the name of any District employee who owns, directly or indirectly, any interest of ten percent (10%) or more of the proposer's firm or any of its branches. Gifts from proposers to Employee's or Employee's Families is strictly prohibited per Florida Statutes 112.313 and 112.3148.

**AWARDS:** As the best interest of the District may require, the right is reserved to make award(s) by individual items, group of items, all or none, or a combination thereof, with one or more suppliers and to reject any proposals or waive any informality or technicality in proposals received. The District intends to select a proposal from the highest qualifying responsible bidder from this bid. Vendors who are awarded contracts are asked to extend the same pricing and conditions to other entities who may want to "piggy-back" on a District Bid or Request for Proposal.

**DISPUTES:** In case of any doubt or difference of opinion as to the items to be furnished hereunder, the decision of the District General Manager shall be final and binding on both parties.

**LEGAL REQUIREMENTS:** Federal, State, County and local laws, ordinances, rules and regulations that in any manner effect the item(s) covered herein apply. Lack of knowledge by the proposer will in no way be cause for relief from responsibility.

**LIABILITY:** The vendor shall hold and save the District, its officers, agents and employees harmless from liability of any kind in the performance of or fulfilling the requirement of the Purchase Orders, which may result from this proposal.

**CANCELLATION:** This agreement may be terminated in whole or in part in writing by either party with thirty (30) days notice in the event of substantial failure by the other party to fulfill its obligations under this agreement through no fault of the terminating party.

**NOTE: ANY AND ALL SPECIAL CONDITIONS ATTACHED HERETO WHICH VARY FROM THESE GENERAL CONDITIONS SHALL HAVE PRECEDENCE.**

## **PUBLIC ENTITY CRIME INFORMATION STATEMENT**

All invitations to bid as defined by Section 287.012(11), Florida Statutes, requests for proposals as defined by Section 287.012(16), Florida Statutes, and any contract document described by Section 287.058, Florida Statutes, shall contain a statement informing persons of the provisions of paragraph (2)(a) of Section 287.133, Florida Statutes, which reads as follows:

“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 on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.”

All vendors who submit a Bid or Request for Proposal to Sun ‘n Lake of Sebring, are guaranteeing that they have read the previous statement, and by signing the bid documents, are qualified to submit a bid under Section 287.133, (2)(a) Florida Statutes.

## **GENERAL SPECIFICATIONS**

### **1. DESCRIPTION OF SERVICE**

The Sun 'n Lake of Sebring Improvement District (hereafter "the District") is seeking proposals from interested vendors (hereafter "the SUPPLIER") to provide General, Liability and Worker's Compensation Insurance. The District intends to select one supplying firm from the Request for Proposals (RFPs) to provide the requested coverages described herein under Scope of Services.

### **2. EFFECTIVENESS AND DURATION**

The agreement(s) resulting from this solicitation is for the items and materials described in this proposal document.

### **3. REFERENCES**

Proposers will complete and return, with the Proposal, a list of at least three (3) client/customer references including company name, address, contact person, telephone number and date you provided the equipment/services to the client. The List of References form provided in these documents should be used. If the Proposer already has a preprinted list of references, then indicate on the District's List of References form "See Attached List." Attach the preprinted list to the District's form and submit both with the Proposal.

### **4. REQUIRED DOCUMENTS**

The following documents included in this Request for Proposal package are required to be submitted along with the Information Requested for this proposal:

- 4.1 Proposal Form
- 4.2 List of References Form
- 4.3 Statement of Insurance Compliance Form
- 4.4 Non-Collusion Affidavit of Proposer
- 4.5 Conflict of Interest Statement
- 4.6 Disputes Disclosure Form
- 4.7 Drug Free Workplace Certification Form
- 4.8 Unauthorized Alien Workforce

### **5. EFFECTIVE PERIOD OF PROPOSALS**

All proposals must state the period for which the proposal shall remain in effect. Such period shall not be less than 120 days from the proposal date.

### **6. RIGHT OF REJECTION BY THE DISTRICT**

Notwithstanding other provisions of this RFP, the District reserves the right to award this contract to the supplying firm that best meets the requirements of the RFP, and not necessarily, to the lowest bidder. Further, the District reserves the right to reject any or all proposals prior to execution of the contract, with no penalty to the District.

### **7. CONTRACT NEGOTIATIONS**

After review of the proposals, the District intends to enter into contract negotiations with the selected supplying firm. These negotiations could include all aspects of equipment, service, and fees. If a contract is not finalized in a reasonable period of time, the District will open negotiations with the next ranked firm.

### **8. AWARD OF CONTRACT**

The proposer to whom a contract is awarded shall be required to enter into a written contract agreement with the District in a form approved by legal counsel for the District. This RFP and the proposal, or any part thereof, may be incorporated into and made a part of the final contract. The District reserves the right to negotiate the terms and conditions of the contract with the selected proposer.

**9. CONTRACT TERM**

It is the intent to award a contract for the 2018/2019 Policy Term (10/01/2018 – 9/30/2019), with automatic renewal for a period of up to 5 years.

**10. QUESTIONS**

All questions concerning this RFP shall be submitted in writing to the name and address below before May 28, 2018. All responses to questions will be addressed in the form of an addendum issued after the question deadline to be posted with the RFP on the District web site [www.snldistrict.org](http://www.snldistrict.org) by May 31, 2018

Allison Lee, Administrative Services Coordinator  
Sun ‘n Lake of Sebring Improvement District  
5306 Sun ‘n Lake Blvd.  
Sebring, FL 33872  
Fax number: 863-382-2014 / E-mail: [alee@snldistrict.org](mailto:alee@snldistrict.org)

Contact made with any other employee and/or elected officials of the District regarding this RFP will be grounds for the rejection of the contracting individual/firm submittal.

**12. BONDS**

In the event that the total awarded contract price to an individual entity is greater than \$100,000.00, Payment and Performance Bonds will be required, each in the amount of 100% of the contract price. Bid bonds are not required for this project.

**13. SUBMITTAL OF PROPOSAL**

All firms submitting a proposal will need to submit One (1) marked original and Three (3) copies of their documents in a sealed package. The left front of the package shall read:

General, Liability and Worker’s Compensation Insurance  
RFP # 18-05  
Due Date: June 7, 2018 – Time: 2:00pm  
Company Name and Address

Documents will need to be mailed or hand delivered to:

Tanya Cannady, General Manager  
Sun ‘n Lake of Sebring Improvement District  
5306 Sun ‘n Lake Blvd.  
Sebring, FL 33872

All documents will need to be delivered to, or received in the mail by the due date and time. Any document submitted or received after this date and time shall not be considered and will be returned to the sender unopened. The District takes no responsibility for late mail or late delivery service.



# SCOPE OF SERVICES

## DESIRED MINIMUM COVERAGES AND EXPOSURES

### **PROPERTY:**

- Building and Contents are to be insured on a Blanket Basis with an Agreed Value endorsement (no coinsurance).
- Coverage is to be on an “All Risk”, “All Other Perils” or “Special Perils Form” or its equivalent, including Flood and Earthquake.
- Coverage is to be on a Replacement Cost basis for real and personal property (see schedules)
- Building Ordinance Coverage should be included.
- Permission to Rebuild at another site or Not to Rebuild.
- Architect Fees should be included.
- Includes Property in Transit.
- Automatic Coverage –Up to - \$20,000,000 – With No Additional Premiums for Remainder of Term.
- Joint Agreement should be included so that the insured will not be penalized if there should be disagreement with the Boiler and Machinery carriers over which policy applies.
- Terrorism can be excluded.
- Deductible should not exceed \$1,000. Per Occurrence – All Other Perils (excluding wind losses)
- Any shared or individual member wind deductible should not exceed 5% of the total values at each building / structure involved in the loss per any one occurrence.
- Any “shared” wind policy limits should be no less than \$75,000,000 for all combined members or collective pool, per any one occurrence as may be outlined in any schedule of limits and/or sub-limits.
- Bidders are to provide detailed information regarding their surplus ratio.

### **Rating Information:**

Properties were inspected and appraised by HCA staff in November 2017. See Exhibit B.

**BUSINESS INCOME/EXTRA EXPENSE:** Business Interruption and Extra Expense Coverage with a \$2,000,000 Blanket Limit.

**INLAND MARINE:** The following Inland Marine floaters are to be included, on a Blanket Basis, with an Agreed Value endorsement (no coinsurance).

- Accounts Receivable \$2,000,000
- Proposers Equipment Blanket/Per Schedule
- Miscellaneous Property Blanket/Per Schedule
- Mobile Radio/Telephone Blanket/Per Schedule
- Valuable Papers \$2,000,000
- Electronic Data Processing
  - Equipment Blanket/Per Schedule
  - Media Included
  - Extra Expense Included
- Watercraft Blanket/Per Schedule
- Physical Damages
- Replacement Cost
- Automatic Coverage No Additional Premium – Remainder of Term (without updating schedule)

For a list of Inland Marine Exposures, see Exhibit A.

**BOILER AND MACHINERY:** Comprehensive coverage including breakdown, should be proposed for all locations, for all objects in use or connect ready for use, objects acquired by the District after policy inception and at newly acquired locations.

Coverage is requested for all objects which may qualify as fired or unfired vessels, refrigerating and air conditioning systems and piping and accessory equipment for all objects which may qualify as mechanical or electrical machines, apparatus or equipment which generates, controls, transmits, transforms, or utilizes mechanical or electric power or energy.

**Amount of Coverage:**

Limit per Accident	\$50,000,000 Per Loss
	\$10,000 Deductible for transformers 10k KVA or higher
	\$1,000 Deductible all other

Variation should be on a repair or replacement cost basis.

**COMPREHENSIVE GENERAL LIABILITY:**

- Premises and Operations
- Products and Completed Operations
- Blanket Contractual, including hold harmless agreements with public entities and non-public entities
- Athletic Participation
- Broad Form Property Damage
- Employee Benefits Liability
- Failure to Supply (water)
- Fire Damage Liability
- Host Liquor and Liquor Liability, including “X, C, U”
- Personal Injury
- Sewer Backup
- Watercraft Liability
- Deletion of “Care, Custody and Control” Exclusion
- Include Pesticide/Herbicide Spraying – Pollution
- Include Coverage for Legal Counsel on EEOC Administrative Hearings

**Named Insured:** The Entity, Commissioners, elected or appointed officials, including past officials, employees and volunteers while acting within the scope of his duties. PLUS: Any affiliated or subsidiary board, authority, committee or independent agency (including newly constituted) provided that such affiliated or subsidiary board, authority, committee or independent agency is either a body politic created by a listed named insured, or one in which controlling interest or membership therein is vested in a listed named insured.

An Occurrence Form should be proposed.

The following limits of coverage should be proposed. Alternative, higher limits may be proposed if the additional cost is reasonable.

**Limits of Liability:**

General Aggregate Limit	No Aggregate
Products & Completed Operations Aggregate Limit	No Aggregate
Personal Injury	\$2,000,000
Each Occurrence	\$2,000,000

The District does not permit the insurers to endorse their policies to waive the District's sovereign immunity above \$100,000 per claim, or \$200,000 per occurrence under prior statutory limits, or \$200,000 per claim, or \$300,000 per occurrence under current statutory limits.

**General Liability Exposure and Rating Data:**

For relevant exposure data, see Exhibits A and C.

**Deductible:** None.

**BUSINESS AUTOMOBILE:** Business Automobile Liability including hired and non-owned coverage limit of liability: \$200,000 per occurrence.

**Personal Injury Protection:** As required by State or Federal Law.

**Uninsured/Underinsured Motorist Options:** Exclude, Occurrence Form should be proposed.

**Named Insured:** The Entity, Commissioners, elected or appointed officials, including past officials, employees and volunteers while acting within the scope of his/her duties. PLUS: Any affiliated or subsidiary board, authority, committee or independent agency (including newly constituted) provided that such affiliated or subsidiary board, authority, committee or independent agency is either a body politic created by a listed named insured, or one in which controlling interest or membership therein is vested in a listed named insured.

Automatic coverage throughout the policy term without updated scheduling – No Additional Premium

The District does not permit the insurers to endorse their policies to waive the District's sovereign immunity above \$100,000 per claim, or \$200,000 per occurrence under prior statutory limits, or \$200,000 per claim, or \$300,000 per occurrence under current statutory limits.

**Schedule of Vehicles:** See Exhibit A.

**Deductible:** None

**AUTOMOBILE PHYSICAL DAMAGE:** Automatic coverage should apply through policy term.

**Coverage is to include:**

- Comprehensive and Collision
- Hired and Non-owned Auto Physical Damage
- Includes Garage keepers Legal Liability \$2,000,000

**Schedule of Vehicles:** See Exhibit A.

**Deductible:** \$1,000

**PUBLIC OFFICIALS LIABILITY:** Coverage is desired for any civil claim because of a wrongful act not ordinarily covered by general liability policies, including potential obligations arising from allegations of inadequate handling of employee disciplinary problems, acts alleging discrimination, hiring/firing, federal civil rights, sexual harassment, and zoning. Coverage should be included for EEOC Administrative Hearings. Please specify coverage and limits for EEOC actions.

Proposer may quote coverage for Sexual Misconduct Coverage separately, if not included as part of the underlying Public Officials Liability. Please clarify included or excluded. If available separately, please quote.

**Named Insured:** The Entity, Commissioners, elected or appointed officials, including past officials, employees and volunteers while acting within the scope of his/her duties. PLUS: Any affiliated or subsidiary board, authority, committee

or independent agency (including newly constituted) provided that such affiliated or subsidiary board, authority, committee or independent agency is either a body politic created by a listed named insured, or one in which controlling interest or membership therein is vested in a listed named insured.

**Limit of Liability:** \$2,000,000 per occurrence, \$6,000,000 aggregate

**Deductible:** None

Either "claims made" or "occurrence" forms may be proposed.  
If "claims made" coverage is proposed, indicate the Retro Date and availability of the Extended Reporting Period (tail) Coverage and the maximum duration of coverage.

**Rating Information:** See Exhibit A.

**COMMERCIAL CRIME:**

**Faithful Performance:** Employee dishonesty with faithful performance coverage. It is preferred that coverage include treasurers, comptroller, finance director or tax collectors.

**Limits of Liability:** \$500,000

Monies & Securities  
Forgery or Alteration  
Employee Dishonesty

**Deductible:** \$1,000 per occurrence

**Rating Information:** See Exhibit A.

**WORKERS' COMPENSATION:**

**Coverage:** Standard Worker's Compensation Insurance is to be provided in accordance with Florida Worker's Compensation Law and Florida Statutory Limits.

Employer's Liability:	
Each Accident	\$3,000,000
Disease – Policy Limit	\$3,000,000
Disease – Each Employee	\$3,000,000
Other States Insurance:	Included

**Deductible:** None

The following endorsements should be provided:

Maritime Coverage Endorsement  
Broad Form All States  
Voluntary Compensation Endorsement

**Rating Information:** See Exhibits A, D and E.

**NOTE: CURRENT EXPERIENCE MOD IS 1.14**

**PLEASE PROVIDE PROPOSAL QUOTE(S) FOR THE FOLLOWING ADDITIONAL COVERAGES:**

**UMBRELLA / EXCESS COVERAGE:** Umbrella/excess liability coverage should be excess of third party liability coverage with “Follow Form” coverage provisions. It is preferred that coverage be included for Public Officials Liability. Coverage should be no less restrictive than the underlying liability policy.

**Limit of Liability:** \$3,000,000

Self-Insured or Pool retention options are to be clearly identified. Any deductible options are to be clearly identified. Bidder should have access to appropriate markets to place Umbrella/Excess coverage, in addition to the primary policies described within. Any and all broker fees and/or commissions for placing Umbrella/Excess coverage are to be fully disclosed if there is an additional cost for placing coverage which is not included in the total premium cost.

**POLLUTION AND REMEDIATION LEGAL LIABILITY COVERAGE:** Bidder should have access to the appropriate markets to place Pollution Liability coverage, in addition to the primary policies described within. Any and all broker fees and/or commissions for placing Pollution Liability coverage are to be fully disclosed if there is an additional cost for placing coverage which is not included in the total premium cost.

Individual, Self-Insured or Pool retention options are to be clearly identified. Any deductible options are to be clearly identified. Individual or Combined aggregate limits are to be clearly identified.

**Limits of Liability:** \$1,000,000 Each Pollution Condition  
\$1,000,000 Total All Losses

**Retention:** \$10,000 Each Loss

Either “claims made” or “occurrence” forms may be proposed.  
If “claims made” coverage is proposed, indicate the Retro Date and availability of the Extended Reporting Period (tail) Coverage and the maximum duration of coverage.

**Rating Information:** See Exhibit F.

**STORAGE TANK THIRD-PARTY LIABILITY, CORRECTIVE ACTION & CLEANUP COSTS:** Bidder should have access to the appropriate markets to place Storage Tank Liability coverage, in addition to the primary policies described within. Any and all broker fees and/or commissions for placing Storage Tank Liability coverage are to be fully disclosed if there is an additional cost for placing coverage which is not included in the total premium cost.

Individual, Self-Insured or Pool retention options are to be clearly identified. Any deductible options are to be clearly identified. Individual or Combined aggregate limits are to be clearly identified.

**Limits of Liability:** \$1,000,000 Each Incident  
\$1,000,000 Aggregate

**Deductible:** \$5,000 Each Incident

Either “claims made” or “occurrence” forms may be proposed.  
If “claims made” coverage is proposed, indicate the Retro Date and availability of the Extended Reporting Period (tail) Coverage and the maximum duration of coverage.

**Rating Information:** See Exhibit G.

## ADDITIONAL INFORMATION

**MOST RECENT FINANCIAL STATEMENT AND ANNUAL REPORT:** The District's Fiscal Year 2014 Audited Financial Statement is available to download via the District's website, [www.snldistrict.org](http://www.snldistrict.org).

**CURRENT EXPOSURE INFORMATION:** Provided in the District's most recent renewal application submitted to our current carrier for proposed coverage period beginning 10/01/2018. See Exhibit A.

**LOSS AND HISTORICAL EXPOSURE INFORMATION:** For detailed loss and financial loss information for all lines of claims, see Exhibit C.

**LOSS CONTROL ASSISTANCE:** Proposers are expected to provide loss control/safety assistance as needed and are requested to submit all pertinent information regarding loss control programs, staff qualifications, and applicable cost if additional.

**CLAIM SERVICE:** Proposers are expected to coordinate claim services with the District's staff. Indication of the locations, staffing, and qualifications of claims offices and staff serving the District should be submitted. The District is also desirous of prompt and accurate claims data reports on an annual basis.

**ERRORS AND OMISSIONS COVERAGE:** All brokers are to provide evidence of at least \$1,000,000 of Error and Omissions coverage, and any other insurance coverage or risk financing program intended to cover similar incidents in the broker-insured relationship.

**COMPLETION OF PROPOSAL SUBMISSION FORM:** Due to variations in insurance contracts (i.e. occurrence vs. claims made, aggregate limits, etc.) and ratable exposures, all proposers are expected to base their quotations on the rating data provided and **must complete the Proposal Submission Form, which must accompany the proposal submission.**

**USE OF INFORMATION IN SPECIFICATIONS:** The information provided in these specifications, including all attachments, shall be used only for the purposes of preparing proposals for risk financing services including insurance policies as discussed herein.

**UNUSUAL FEATURES:** Proposers shall attach to their proposals descriptions of any unusual or specific features which will be provided in their program.

**EXCEPTIONS OR ALTERNATIVES TO SPECIFICATIONS:** Any and all deviations from the specifications must be individually identified as an alternative proposal or specific deviations from the specifications. If no exceptions are stated, it will be understood that all general and specific conditions will be complied with, without exception.

**COORDINATION WITH UMBRELLA OR EXCESS LIABILITY POLICY:** If an umbrella or another excess liability policy is also proposed, there should be no gaps or overlaps of coverage, especially with regard to the actual coverage, defense, notice of accidents/occurrence/circumstances, notice of claims and extended reporting period (if applicable). If there are any, please explain.

**OCCURRENCE OR CLAIMS MADE FORM:** The District requests that proposals be submitted on an occurrence form. If a claims made form is proposed, the coverage limits are to be the same as requested for the occurrence form policy.

**Supplemental Extended Reporting Period (Tail Coverage).** The cost of a supplemental extended reporting period endorsement with no less coverage and with reinstated aggregate limits must be proposed. Premium should be based upon coverage commencing at expiration of the proposed claims made policy and should be indicative of the maximum period of endorsement duration, which must be indicated.

**POLLUTION LIABILITY:** Please indicate cost and coverage of any available pollution liability endorsement.

**EMPLOYEE BENEFIT LIABILITY:** Coverage should include liability for administrative error in administration of the employee benefits program. The District's benefits include group coverages (health, vision, dental and life), workers compensation, social security, unemployment compensation and pension plans.

**DISCRIMINATION/SEXUAL HARASSMENT LIABILITY:** Please propose liability and defense coverage for allegations of discrimination and or sexual harassment.

## **EVALUATION CRITERIA**

One selection will be made from the equipment supplier proposer/bidder who is deemed to be the best suited among those submitting proposals on the basis of the previous Scope of Materials and the evaluation factors listed below. Proposer/Bidder shall be descriptive in their proposal on each of, but not limited to, the areas listed below.

Once the District has reviewed the submitted proposals, the District selection committee will use the criteria listed below to evaluate each proposal separately. These criteria are in no particular order.

1. Value.
2. References.
3. Relevant experience providing similar services with public sector clients.
4. Quality and conciseness of proposals.
5. Overall ability of vendor to meet the needs of the District.

**END OF EVALUATION CRITERIA**



**SUN 'N LAKE OF SEBRING  
IMPROVEMENT DISTRICT**  
General, Liability and Worker's Compensation  
Insurance  
**PROPOSAL SUBMISSION FORM**  
**RFP NO. 18-05**

To: Sun 'n Lake of Sebring Improvement District  
5306 Sun 'n Lake Blvd.  
Sebring, FL 33872

The undersigned hereby declares that after carefully examining these proposal documents, they are fully aware of all conditions affecting such work/items, for which proposals were advertised to be returned by **June 7, 2018** and does hereby submit the following proposal for completion of said work/items. All changes must be initialed in ink.

The Proposer:

A. Acknowledges receipt of:

- 1) Proposal Specifications
- 2) Addenda:

No. \_\_\_\_\_ Dated \_\_\_\_\_

No. \_\_\_\_\_ Dated \_\_\_\_\_

B. Has examined the Proposal Documents and understands that in submitting his Bid, he waives all right to plead any misunderstanding regarding the same.

As requested in the General Conditions, attached are two marked duplicate copies of the original Proposal Form and ALL attachments. \_\_\_Yes \_\_\_No (check one)

Attached, as required in the General Specifications section, is the List of References. \_\_\_Yes \_\_\_No (check one)

**Goods and Services to be provided for a proposed price of \$\_\_\_\_\_ .\_\_\_\_\_ US Dollars. Alternate A Price: \$\_\_\_\_\_ .\_\_\_\_\_ US Dollars.**

The District reserves the right to accept any or all proposals, to waive informalities, and to reject all or any part of any proposal as they may deem to be in the best interest of the District.

This Proposal Form is a mandatory form to ease tabulation and analysis; however, it can be accompanied by additional support forms. An officer or representative who has official authorization to sign proposals **MUST** sign this Proposal Form. Failure to sign in the space provided below will result in the Proposal's rejection.

Company Name \_\_\_\_\_  
FEIN or SS# \_\_\_\_\_  
Name of Owner/Partner/Officer \_\_\_\_\_  
Title/Position of Owner/Partner/Officer \_\_\_\_\_  
Signature of Owner/Partner/Officer \_\_\_\_\_  
Business Telephone \_\_\_\_\_ Fax: \_\_\_\_\_  
Business Address \_\_\_\_\_  
City/State/Zip \_\_\_\_\_





**CONFLICT OF INTEREST STATEMENT**

STATE OF FLORIDA

\_\_\_\_\_

Before me, the undersigned authority, personally appeared \_\_\_\_\_, who was duly sworn, deposes, and states:

- 1. I am the \_\_\_\_\_ of \_\_\_\_\_ with a local office in \_\_\_\_\_ and principal office in \_\_\_\_\_.  
City and State City and State
- 2. The above named entity is submitting a Proposal for the Sun ‘n Lake of Sebring Improvement District **RFP # 18-05** described as: General, Liability and Worker’s Compensation Insurance
- 3. The Affiant has made diligent inquiry and provides the information contained in this Affidavit based upon his own knowledge.
- 4. The Affiant states that only one submittal for the above proposal is being submitted and that the above named entity has no financial interest in other entities submitting proposals for the same project.
- 5. Neither the Affiant nor the above named entity has directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraints of free competitive pricing in connection with the entity’s submittal for the above proposal. This statement restricts the discussion of pricing data until the completion of negotiations, if necessary, and execution of the Contract for this project.
- 6. Neither the entity nor its affiliates, nor anyone associated with them, is presently suspended or otherwise ineligible from participation in contract letting by any local, State, or Federal Agency.
- 7. Neither the entity, nor its affiliates, nor anyone associated with them have any potential conflict of interest due to any other clients, contracts, or property interests for this project.
- 8. I certify that no member of the entity’s ownership or management is presently applying for an employee position or actively seeking an elected position with the Sun ‘n Lake of Sebring Improvement District.
- 9. I certify that no member of the entity’s ownership or management, or staff has a vested interest in any aspect of the District.
- 10. In the event that a conflict of interest is identified in the provision of services, I, on behalf of the above named entity, will immediately notify the District.

**Dated** this \_\_\_\_ day of \_\_\_\_\_, 2015

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Typed Name and Title

Sworn to and subscribed before me this \_\_\_\_ day of \_\_\_\_\_, 2018

Personally Known \_\_\_\_\_ Or produced identification \_\_\_\_\_. Identification Type: \_\_\_\_\_

Notary Public-State of \_\_\_\_\_  
\_\_\_\_\_  
Printed, typed, or stamped commissioned name of notary public

My commission expires \_\_\_\_\_

**\*\*THIS FORM MUST BE COMPLETED AND RETURNED WITH YOUR PROPOSAL.**

**DISPUTES DISCLOSURE FORM**

**Answer the following questions by placing an “X” after “YES” or “NO”. If you answer “YES”, please explain in the space provided, or via attachment.**

Has your firm or any of its officers, received a reprimand of any nature or been suspended by the Department of Professional Regulations or any other regulatory agency or professional association within the last five (5) years?

YES \_\_\_\_\_ NO \_\_\_\_\_

Has your firm, or any member of your firm, been declared in default, terminated or removed from a contract or job related to the services your firm provides in the regular course of business within the last five (5) years?

YES \_\_\_\_\_ NO \_\_\_\_\_

Has your firm had against it or filed any requests for equitable adjustment, contract claims, bid protests, or litigation in the past five (5) years that is related to the services your firm provides in the regular course of business?

YES \_\_\_\_\_ NO \_\_\_\_\_

If yes, state the nature of the request for equitable adjustment, contract claim, litigation, or protest, and state a brief description of the case, the outcome or status of the suit and the monetary amounts or extended contract time involved.

I hereby certify that all statements made are true and agree and understand that any misstatement or misrepresentation or falsification of facts shall be cause for forfeiture of rights for further consideration of this proposal for the Sun ‘n Lake of Sebring Improvement District, RFP # 18-05 General, Liability and Worker’s Compensation Insurance

\_\_\_\_\_

Firm

\_\_\_\_\_

Date

\_\_\_\_\_

Authorized Signature and Title

\_\_\_\_\_

Printed or Typed Name and Title

**\*\*THIS FORM MUST BE COMPLETED AND RETURNED WITH YOUR PROPOSAL.**

