

**REQUEST FOR PROPOSAL: COMPREHENSIVE INSURANCE BROKER FOR
LUTHERAN SOCIAL SERVICES OF THE NATIONAL CAPITAL AREA**

February 9, 2023

Name of brokerage firm

Address

Dear _____:

Lutheran Social Services of the National Capital Area (LSSNCA) is seeking written proposals for an insurance brokerage firm to provide comprehensive insurance brokerage services to LSSNCA. Technical questions or requests for clarification should be directed to the person and email address below. LSSNCA's responses to questions will be provided by return email and will not be shared with other respondents. Please direct questions to:

Sarah M. Phelps
LSSNCA
1730 Rhode Island Avenue, NW, Suite 712
Washington, DC 20036
phelpss@lssnca.org

GENERAL INFORMATION

1. Key Dates in the RFP process:

- February 10: RFP is available
- February 10-24: Question and answer period
- March 3: Deadline for the receipt of proposals to LSSNCA's offices (above)
- March 6-March 10: Interviews with select respondents, at LSSNCA's option
- March 13: Selection made

LSSNCA reserves the right to extend these deadlines if it believes it is necessary to do so.

2. Description of LSSNCA

Since 1917, LSSNCA has evolved to meet the changing needs of its community, while staying true to its mission of accompanying those in need to foster resiliency, self-sufficiency, and access to opportunities by creating, connecting with, and engaging welcoming communities.

Today, LSSNCA continues to serve throughout the Greater Washington, DC area with refugee and immigrant resettlement (including identifying housing) and workforce

development programs; family and children services including foster care for unaccompanied refugee minors; health and wellness services such as CARE for Newcomers, and healthy relationships education through our Youth Development and Wellness initiatives. With the help of partners and volunteers, LSSNCA strives to achieve an inclusive community where people thrive.

Because of the wide-ranging nature of our work, LSSNCA is seeking an insurance broker who can identify products that offer robust coverage for the broad array of our programs and services. In addition to the traditional policies typically maintained for the structure of a 501(c)(3) corporation, it should be noted that LSSNCA has a range of family and child-serving programs, including foster care and adoption services, and we are seeking an insurance product that will address all of LSSNCA's program needs. The successful respondent will have experience in this market and a demonstrated expertise in obtaining the best possible coverage for LSSNCA's activities.

3. Proposal Guidelines

Please observe to following guidelines in responding to this request for proposal:

- a. Respond to the questions that follow as directly as possible, and please include any supporting documentation you feel is pertinent.
- b. Electronic proposals must be emailed to phelpss@lssnca.org no later than March 3 at 5:00 p.m. ET.
- c. Our final broker selection will be made based on our evaluation of the responses to the questions in this request for proposal, as well as an oral interview, if applicable.
- d. Please keep proposal packages as brief as possible.
- e. Please note that LSSNCA receives financial support in part through a series of federal and state grants which contain expenditure reporting requirements. As a result, LSSNCA may not be able to keep confidential any compensation arrangements made with the successful respondent.

4. Minimum Qualifications

All firms submitting a proposal must:

- a. Be appropriately licensed, nationwide;
- b. Have the expertise, experience, licensing and resources to provide brokerage services for LSSNCA's needs;
- c. Be able to allocate sufficient staff time to LSSNCA to answer questions and to provide specific technical expertise regarding insurance coverage to LSSNCA as needed.

5. Rules Regarding Proposals

- a. All proposals will be kept confidential.
- b. All materials submitted in response to this RFP will become the property of LSSNCA.
- c. Proposals may not be modified after they are submitted.
- d. Late submissions will not be considered, absent extraordinary circumstances.
- e. LSSNCA reserves the right to waive minor irregularities in the RFP process or in individual proposals, in its sole discretion, if doing so is in the best interest of LSSNCA.
- f. After the close of the submission period, LSSNCA will evaluate all responses to the RFP. After this initial review, and in its sole discretion, LSSNCA may elect to ask certain respondents to be interviewed to allow them to expand on their written submissions.
- g. The final selection of the successful respondent is scheduled to be completed by March 13th by 5 p.m. ET. This date may be extended if circumstances require.

6. Questions

Please answer the following questions as part of your submission:

- a. Please provide a brief description of your firm, including history, size, volume of business, including number of current clients, number of years in business and the principles that guide your work.
- b. Please provide an overview of the size and qualifications of the people who would be assigned to LSSNCA, and why they would be the best match for LSSNCA's needs.
- c. Please describe any ongoing training opportunities provided to your staff.
- d. Please give examples of two other clients for whom you have obtained complex insurance coverage and details as to why their cases were unique or complex.
- e. Please provide names and contact details of three (3) references.
- f. Please describe your processes for ensuring client satisfaction with your services.
- g. Please include any other information you believe would be of interest to LSSNCA.
- h. Please describe how you would expect to be compensated for the services outlined in this request for proposal.

All preparation costs associated with responding to this RFP will be borne solely by the respondent.

Thank you very much for your interest in LSSNCA, and we look forward to your proposal.