



**COVER PAGE & CONTACT PERSON INFORMATION—SECTION 5.2 (1)**

**Brown & Brown of Florida Inc**

**FOR**

**PUBLIC OFFICIALS AND EMPLOYMENT PRACTICES LIABILITY**

**POLICE PROFESSIONAL LIABILITY, EXCESS WORKERS' COMPENSATION**

**INSURANCE SERVICES**

**RFP No. 57-18-19**

Include this sheet as the very first page of your Proposal. Please complete the entire form in its entirety. The contact person indicated should be someone the City may contact for any questions or provide any correspondence related to this Solicitation.

Legal Name of Proposer(s): Brown & Brown of Florida Inc.

Federal Employee Identification (FEIN) No: 59-0691921

Mailing Address: 1780 N. Krome Avenue

City, State, Zip Code: Homestead, FL 33030

Contact Person: Kathy Nicotra & Thomas R. Jones Jr

Title: Account Executive & Executive VP

Email Address: Knicotra@bbinsfl.com

Telephone Number: 305-246-7515

Fax Number: 305-248-8543







City of North Miami, FL

RFP No. 57-18-19

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### 5.2.3 LETTER OF INTRODUCTION

**City of North Miami RFP No. 57-18-19**



| **Presented by: Brown & Brown of Florida dba T.R. Jones & Co.**

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# SECTION 5.2 (3)

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## LETTER OF INTRODUCTION

Brown & Brown's philosophy is our commitment to provide superior professional insurance services and unparalleled market cost advantage to its clients. We believe to effectively accomplish this; one must accumulate the broadest array of markets, programs and professionals in today's complex insurance environment. Additionally, for the array of products and services to be effective they must be coordinated by highly talented insurance professionals, especially for our most complex clients.

With regard to this proposal you have three of our best, Tom Jones, Kathy Nicotra and Michelle Wilson. These account managers will coordinate the implementation of the broker, risk management and service responsibilities requested in this RFP.

We believe that the power and reach of Brown & Brown's divisions behind this experienced team and the effectiveness of our services is bringing a new level of services and professionalism to your account.

Our experience in this market is unmatched. Brown & Brown currently insures approximately 400 public entities in Florida alone. We have access to traditional insurers as well as emerging public entity insurers and exclusive access to several specialty markets and programs for public entities.

Through a number of Brown & Brown, Inc. subsidiaries we have developed specialized and in some cases exclusive access to Property and Casualty as well as third party administrative services.

We at Brown & Brown are proud of our reputation as leaders and experts in the public entity insurance marketplace. Our 97% client retention and long list of satisfied customers are a testament to our abilities.

Brown & Brown is pleased to submit this proposal and hope you find our response clear and concise.

Thomas R. Jones, Jr.  
Executive Vice President



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# SECTION 5.2 (4)

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## Business Structure

Submit copy of State of Florida Department of State records indicating when corporation organized, corporation number, and date and status of most recent annual report. Provide copies of current City/County/State Occupational License(s) where applicable.

See Attached:

[State of Florida Division of Corps](#)  
[State of Florida 2019 Annual Report Filing](#)  
[Agency License](#)  
[Occupational License](#)

**Give the location of the office, which will handle the City's account and the number of professional staff personnel at the office:**

Brown & Brown of Florida, Inc. dba T.R. Jones & Co.  
1780 North Krome Ave.  
Homestead, FL 33030

Professional Staff: 44



[Department of State](#) / [Division of Corporations](#) / [Search Records](#) / [Detail By Document Number](#) /

## Detail by FEI/EIN Number

Florida Profit Corporation

BROWN & BROWN OF FLORIDA, INC.

### Filing Information

<b>Document Number</b>	150616
<b>FEI/EIN Number</b>	59-0691921
<b>Date Filed</b>	04/03/1947
<b>State</b>	FL
<b>Status</b>	ACTIVE
<b>Last Event</b>	AMENDMENT
<b>Event Date Filed</b>	09/11/2014
<b>Event Effective Date</b>	NONE

### Principal Address

220 S. Ridgewood Avenue  
Daytona Beach, FL 32114

Changed: 04/06/2018

### Mailing Address

220 S. Ridgewood Ave.  
Daytona Beach, FL 32114

Changed: 04/06/2018

### Registered Agent Name & Address

C T CORPORATION SYSTEM  
1200 SOUTH PINE ISLAND ROAD  
PLANTATION, FL 33324

Name Changed: 03/20/2012

Address Changed: 03/20/2012

### Officer/Director Detail

#### **Name & Address**

Title President & Director

Keeby, Michael  
1201 W. Cypress Creek Rd., Suite 130  
Ft. Lauderdale, FL 33309

search.sunbiz.org/Inquiry/CorporationSearch/SearchResultDetail?inquirytype=FeiNumber&directionType=Initial&searchNameOrder=59069192115061... 1/4



Title Executive Vice President

Alvarez, Fausto  
14900 NW 79th Court, Suite 200  
Miami Lakes, FL 33016

Title Executive Vice President

Brown, P. Barrett  
Six Concourse Parkway, Suite 2300  
Atlanta, GA 30328

Title Executive Vice President

Cloar, Thomas, IV  
1401 Forum Way, Suite 400  
West Palm Beach, FL 33401

Title Executive Vice President

Farmer, Steve  
220 S. Ridgewood Ave.  
Daytona Beach, FL 32114

Title Executive Vice President

Leavine, Anthony  
655 N. Franklin St. Suite 1900  
Tampa, FL 33602

Title Executive Vice President

Matulis, Peter  
2290 Lucien Way Suite 400  
Maitland, FL 32751

Title Executive Vice President

Shouppe, Alex  
83 Park Place Blvd, Suite 101  
Clearwater, FL 33759

Title VP

Lanni, James  
220 S. Ridgewood Ave,  
Daytona Beach, FL 32114

Title VP

Watts, Andrew R.  
220 S. Ridgewood Ave,

Daytona Beach, FL 32114

## Title Vice President &amp; Secretary

Lloyd, Robert W,  
220 S. Ridgewood Ave,  
Daytona Beach, FL 32114

## Title VP

Robinson, Anthony M.  
220 S. Ridgewood Ave,  
Daytona Beach, FL 32114

## Title Treasurer

Sothen, Michael  
220 S. Ridgewood Ave.  
Daytona Beach, FL 32114

## Title Assistant Secretary

Robinson, Anthony M,  
220 S. Ridgewood Ave.  
Daytona Beach, FL 32114

**Annual Reports**

Report Year	Filed Date
2017	04/14/2017
2018	04/06/2018
2019	03/18/2019

**Document Images**

<a href="#">03/18/2019 — ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">04/06/2018 — ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">04/14/2017 — ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">04/01/2016 — ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">04/13/2015 — ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">09/11/2014 — Amendment</a>	<a href="#">View image in PDF format</a>
<a href="#">04/24/2014 — ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">01/24/2013 — ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">04/25/2012 — ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">03/20/2012 — Reg. Agent Change</a>	<a href="#">View image in PDF format</a>
<a href="#">04/28/2011 — ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">04/28/2010 — ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">03/31/2009 — ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">04/24/2008 — ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">05/02/2007 — Merger</a>	<a href="#">View image in PDF format</a>
<a href="#">04/16/2007 — ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">06/22/2006 — Name Change</a>	<a href="#">View image in PDF format</a>

search.sunbiz.org/Inquiry/CorporationSearch/SearchResultDetail?inquirytype=FeiNumber&directionType=Initial&searchNameOrder=59069192115061... 3/4

<a href="#">03/09/2006 — ANNUAL REPORT</a>	View image in PDF format
<a href="#">02/28/2005 — ANNUAL REPORT</a>	View image in PDF format
<a href="#">02/10/2004 — ANNUAL REPORT</a>	View image in PDF format
<a href="#">07/29/2003 — Merger</a>	View image in PDF format
<a href="#">02/28/2003 — ANNUAL REPORT</a>	View image in PDF format
<a href="#">04/19/2002 — ANNUAL REPORT</a>	View image in PDF format
<a href="#">03/01/2001 — ANNUAL REPORT</a>	View image in PDF format
<a href="#">03/06/2000 — ANNUAL REPORT</a>	View image in PDF format
<a href="#">04/28/1999 — Name Change</a>	View image in PDF format
<a href="#">03/05/1999 — ANNUAL REPORT</a>	View image in PDF format
<a href="#">04/29/1998 — ANNUAL REPORT</a>	View image in PDF format
<a href="#">05/15/1997 — ANNUAL REPORT</a>	View image in PDF format
<a href="#">04/30/1996 — ANNUAL REPORT</a>	View image in PDF format
<a href="#">05/01/1995 — ANNUAL REPORT</a>	View image in PDF format

Florida Department of State, Division of Corporations

**2019 FLORIDA PROFIT CORPORATION ANNUAL REPORT**

DOCUMENT# 150616

**FILED**  
**Mar 18, 2019**  
**Secretary of State**  
**8711599764CC**

**Entity Name:** BROWN & BROWN OF FLORIDA, INC.**Current Principal Place of Business:**

220 S. RIDGEWOOD AVENUE  
DAYTONA BEACH, FL 32114

**Current Mailing Address:**

220 S. RIDGEWOOD AVE.  
DAYTONA BEACH, FL 32114 US

**FEI Number:** 59-0691921**Certificate of Status Desired:** No**Name and Address of Current Registered Agent:**

C T CORPORATION SYSTEM  
1200 SOUTH PINE ISLAND ROAD  
PLANTATION, FL 33324 US

*The above named entity submits this statement for the purpose of changing its registered office or registered agent, or both, in the State of Florida.*

**SIGNATURE:**

Electronic Signature of Registered Agent

Date

**Officer/Director Detail :**

Title PRESIDENT & DIRECTOR  
Name KEEBY, MICHAEL  
Address 1201 W. CYPRESS CREEK RD., SUITE 130  
City-State-Zip: FT. LAUDERDALE FL 33309

Title EXECUTIVE VICE PRESIDENT  
Name BROWN, P. BARRETT  
Address SIX CONCOURSE PARKWAY, SUITE 2300  
City-State-Zip: ATLANTA GA 30328

Title EXECUTIVE VICE PRESIDENT  
Name FARMER, STEVE  
Address 220 S. RIDGEWOOD AVE.  
City-State-Zip: DAYTONA BEACH FL 32114

Title EXECUTIVE VICE PRESIDENT  
Name MATULIS, PETER  
Address 2290 LUCIEN WAY SUITE 400  
City-State-Zip: MAITLAND FL 32751

Title EXECUTIVE VICE PRESIDENT  
Name ALVAREZ, FAUSTO  
Address 14900 NW 79TH COURT, SUITE 200  
City-State-Zip: MIAMI LAKES FL 33016

Title EXECUTIVE VICE PRESIDENT  
Name CLOAR, THOMAS IV  
Address 1401 FORUM WAY, SUITE 400  
City-State-Zip: WEST PALM BEACH FL 33401

Title EXECUTIVE VICE PRESIDENT  
Name LEAVINE, ANTHONY  
Address 655 N. FRANKLIN ST. SUITE 1900  
City-State-Zip: TAMPA FL 33602

Title EXECUTIVE VICE PRESIDENT  
Name SHOUPPE, ALEX  
Address 83 PARK PLACE BLVD, SUITE 101  
City-State-Zip: CLEARWATER FL 33759

**Continues on page 2**

*I hereby certify that the information indicated on this report or supplemental report is true and accurate and that my electronic signature shall have the same legal effect as if made under oath; that I am an officer or director of the corporation or the receiver or trustee empowered to execute this report as required by Chapter 607, Florida Statutes; and that my name appears above, or on an attachment with all other like empowered.*

**SIGNATURE:** ANTHONY M. ROBINSON**ASSISTANT SECRETARY** 03/18/2019

Electronic Signature of Signing Officer/Director Detail

Date



**Officer/Director Detail Continued :**

Title VP  
Name LANNI, JAMES  
Address 220 S. RIDGEWOOD AVE.  
City-State-Zip: DAYTONA BEACH FL 32114

Title VICE PRESIDENT & SECRETARY  
Name LLOYD, ROBERT W.  
Address 220 S. RIDGEWOOD AVE.  
City-State-Zip: DAYTONA BEACH FL 32114

Title TREASURER  
Name SOTHEN, MICHAEL  
Address 220 S. RIDGEWOOD AVE.  
City-State-Zip: DAYTONA BEACH FL 32114

Title VP  
Name WATTS, ANDREW R.  
Address 220 S. RIDGEWOOD AVE.  
City-State-Zip: DAYTONA BEACH FL 32114

Title VP  
Name ROBINSON, ANTHONY M.  
Address 220 S. RIDGEWOOD AVE.  
City-State-Zip: DAYTONA BEACH FL 32114

Title ASSISTANT SECRETARY  
Name ROBINSON, ANTHONY M.  
Address 220 S. RIDGEWOOD AVE.  
City-State-Zip: DAYTONA BEACH FL 32114

# FLORIDA DEPARTMENT of FINANCIAL SERVICES

BROWN & BROWN OF FLORIDA, INC.

655 NORTH FRANKLIN STREET  
SUITE 1900  
TAMPA FL 33602

Agency License Number L007011

Location Number: 125245

Issued On 07/25/2006

Pursuant To Section 626.0428, Florida Statutes, This Agency Location Shall Be In The Active Full-Time Charge Of A Licensed And Appointed Agent Holding The Required Agent Licenses To Transact The Lines Of Insurance Being Handled At This Location.

Pursuant To Subsection 626.172(4), Florida Statutes, Each Agency Location Must Display The License Prominently In A Manner That Makes It Clearly Visible To Any Customer Or Potential Customer Who Enters The Agency Location.



Jeff Atwater  
Chief Financial Officer  
State of Florida



# City of Homestead

## Local Business Tax Receipt

**Tax Receipt No:** 0000385

**Expiration Date:** 09/30/2019

**License Type:** COM

**Tax Receipt Name:**

T R JONES & CO.,  
1780 N KROME AVE  
HOMESTEAD, FL 33030-3236

Category	Description	Units
64000	AGENCY/BROKER - INSURANCE	9.00

**Hours of Operation:**

**Comments:**

UVAR 88-4-30 BLDG INTO P ZO

NE:

Note: If any information is incorrect, please call: 305-224-4504

**Mailing Address:**

T R JONES & CO.,  
P.O. BOX 1505  
HOMESTEAD, FL 33090

The issuance of a local business tax receipt does not permit the licensee to violate any zoning laws of the county or municipality, nor does it exempt the licensee from any other license or permit that may be required by law, nor does it certify that the licensee is qualified to engage in the business, profession or occupation specified hereon.

CITY OF HOMESTEAD  
TAX RECEIPT DIVISION  
100 CIVIC COURT  
HOMESTEAD, FLORIDA 33030

THIS TAX RECEIPT MUST BE PROMINENTLY DISPLAYED

**Local Business Tax Receipt**

Miami-Dade County, State of Florida

-THIS IS NOT A BILL - DO NOT PAY

**LBT**

4760824

**BUSINESS NAME/LOCATION**

TR JONES &amp; COMPANY

MUNICIPALITIES LOC

COMMERCIAL LESSORS FL 33888

**RECEIPT NO.****RENEWAL  
4970381****EXPIRES****SEPTEMBER 30, 2019**Must be displayed at place of business  
Pursuant to County Code  
Chapter 8A - Art. 9 & 10**OWNER**

THOMAS R JONES JR

**SEC. TYPE OF BUSINESS**

192 COMMERCIAL/INDUST/OFFICE SPACE

**PAYMENT RECEIVED  
BY TAX COLLECTOR**

\$75.00 09/11/2018

CHECK21-18-087191

Aggregate sq. ft. 4677

This Local Business Tax Receipt only confirms payment of the Local Business Tax. The Receipt is not a license, permit, or a certification of the holder's qualifications, to do business. Holder must comply with any governmental or nongovernmental regulatory laws and requirements which apply to the business.

The RECEIPT NO. above must be displayed on all commercial vehicles - Miami-Dade Code Sec 8a-276.

For more information, visit [www.miamidade.gov/taxcollector](http://www.miamidade.gov/taxcollector)

**Local Business Tax Receipt**

Miami-Dade County, State of Florida

-THIS IS NOT A BILL - DO NOT PAY

**LBT**

4760873

**BUSINESS NAME/LOCATION**

TR JONES &amp; COMPANY

MUNICIPALITIES LOC

COMMERCIAL LESSORS FL 33888

**RECEIPT NO.****RENEWAL  
4970456****EXPIRES****SEPTEMBER 30, 2019**Must be displayed at place of business  
Pursuant to County Code  
Chapter 8A - Art. 9 & 10**OWNER**

THOMAS JONES &amp; L A LUND

**SEC. TYPE OF BUSINESS**

192 COMMERCIAL/INDUST/OFFICE SPACE

**PAYMENT RECEIVED  
BY TAX COLLECTOR**

\$75.00 09/11/2018

CHECK21-18-086902

Aggregate sq. ft. 1117

This Local Business Tax Receipt only confirms payment of the Local Business Tax. The Receipt is not a license, permit, or a certification of the holder's qualifications, to do business. Holder must comply with any governmental or nongovernmental regulatory laws and requirements which apply to the business.

The RECEIPT NO. above must be displayed on all commercial vehicles - Miami-Dade Code Sec 8a-276.

For more information, visit [www.miamidade.gov/taxcollector](http://www.miamidade.gov/taxcollector)

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# SECTION 5.2 (5)

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## Qualifications/Experience of the Broker/Firm

**State if the business is licensed:** Brown & Brown is licensed, permitted and/or admitted to do business in the State of Florida. See copies of all licenses issued to the business entity (including State of Florida Sun Biz report) within section 4 of this publication.

**State the Date Incorporated:** Brown & Brown was organized/incorporated 04/03/1947

**Indicate parent or subsidiary:** T.R. Jones & Co., a Division of Brown & Brown of Florida, Inc. has origins that date back to 1947. We are deeply rooted in our community and are wholly owned by Brown & Brown Inc., one of the largest independent insurance intermediary organizations in both the U.S. and the world. The Company is publicly owned corporation with its stock traded on the New York Stock Exchange under the symbol BRO (NYSE:BRO).

**State-specific experience demonstrating your firm's ability to provide type, quality, and quantity of Services requested, including experience of delivering these services, technical skills in providing these services to similar type and size entity.**

The dedicated team that will handle the City's account has over 95 years combined experience with 79 years of municipal experience.

We developed a municipal SIR program for one of our clients in 1977. This program is still in place today.

We have identified gaps in coverage and created unique casualty solutions for exposures typically not addressed or are excluded by other municipal brokers/carriers.

Through our subsidiary, Public Risk Underwriters, Christopher Kittleson, Sr. Risk Control Consultant will continue his hands on participation on the City's General Accident Review Boards and respond to other safety related issues as needed. The City will continue to have access to the Target Solutions , an on-line training platform offering more than 600 courses, J.J. Keller Video on Demand, The Preferred TIPS Reimbursement Program, Educational Seminars, and My Community Workplace.

In 2016, we were asked to get involved on a temporary basis with another City during a period of time when the City apparently had no risk manager and was experiencing issues involving their TPA Service provider. In addition, special events were fast approaching with no agent to place the coverage and the City's public officials/employment practices liability policy was due to renew within days with no agent to negotiate renewal terms on behalf of the City. During this time, we facilitated a meeting and resolved the issue with the TPA provider; placed two special events policies and completed applications and secured renewal quotes on behalf of the City for public officials/employment practices liability policy within days of expiration and bound coverage at the City's request.



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# SECTION 5.2 (5)

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## Qualifications/Experience of the Broker/Firm (Cont'd)

**State-specific experience demonstrating your firm's ability to provide type, quality, and quantity of Services requested, including experience of delivering these services, technical skills in providing these services to similar type and size entity.**

Shortly thereafter, the City's HR and Risk Management positions were in transition. This was a turbulent time for the City and obtaining information and data to procure options for the 10/1 renewal was challenging. Nonetheless, we were successful in securing optional quotes that accomplished the following through a change in carriers:

- Premium reduction of \$80,319 as compared to the expiring term .
- Guaranteed Property rate for two years.
- Guaranteed Excess Workers' Comp rate for two years.
- Broadened Property Coverage:
  - Included \$1,000,000 of blanket unscheduled inland marine values.
  - Provided windstorm coverage on structures previously excluded..
  - Reduced the All Other Peril Deductible from \$100,000 to \$25,000.
  - Excess Flood Limit increased to \$10,000,000 from \$4,500,000.
  - Included \$5,000,000 earth movement, earth quake and sinkhole coverage.
  - Reduced Boiler & Machinery Deductible from \$100,000 to \$25,000
  - Reduced Flood Deductible in zones B,C,& X from \$100,000 to \$25,000
  - Coordinated and attended the property inspection and appraisal at no cost to the City to verify that the values were insured to replacement cost.

The National Public Entity Division of Brown & Brown has in excess of 400 public entity, counties and school board clients in Florida alone and is one of the largest providers of insurance and risk management services to the public entity sector in the State of Florida.

Our approach to the work is based on our strength, stability, qualifications, and most importantly our experience with similar accounts in the municipal sectors.

Brown and Brown's philosophy in today's ever changing more difficult and complicated insurance environment is to enlist the coordination and alliance of its professional divisions to proactively provide our clients with broad insurance protection and risk management support as well as unparalleled services in today's insurance environment. Additionally, Brown & Brown will provide our clients with unequalled access to the insurance marketplace.

Our access to the marketplace will give the City of North Miami the broadest array of options for their risk transfer.

Your account managers will coordinate and effect the alliance of marketing and service responses from a variety of markets to include other Brown & Brown subsidiaries.



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## SECTION 5.2 (5)

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### **Qualifications/Experience of the Broker/Firm (Cont'd)**

**State-specific experience demonstrating your firm's ability to provide type, quality, and quantity of Services requested, including experience of delivering these services, technical skills in providing these services to similar type and size entity.**

Hurricane Andrew hit Homestead in the early morning hours of August 24, 1992. The City was devastated. Within a week, we delivered significant claims check advances (in the 6 & 7 figure range) to our clients. Furthermore, because of our aggressive Catastrophe Contingency Plan, our office was one of three businesses within the City that was operational immediately following the storm.

We are prepared to be operational when other agencies will be closed as a result of storm damage. Our buildings are hardened and are serviced with auxiliary power.

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# SECTION 5.2 (5)

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## Qualifications/Experience of the Broker/Firm (Cont'd)

**State-specific experience demonstrating your firm's ability to provide type, quality, and quantity of Services requested, including experience of delivering these services, technical skills in providing these services to similar type and size entity: (Cont'd)**

We truly believe our team approach provides you the best possible responsive results while still having key division managers responsible to you.

### Public Entity Division

**Public Risk Underwriters** – Public Risk Underwriters an operating unit of Brown & Brown, Inc. is recognized as one of the nation's premier program administrators of public sector business.

### Special Risk Division

**Peachtree Special Risk Brokers LLC** – Another Brown & Brown, Inc. subsidiary is considered one of the best property brokers in the country in meeting today's demands for Florida property insurance. Brown & Brown writes more property insurance in Florida than any other broker in the United States.

**Preferred Governmental Insurance Trust (PGIT)** - Competitive and responsive workers' compensation programs and services formed exclusively for Brown & Brown public entity clients.

### Reinsurance Division

**Brown and Brown Re** – Was formed to meet the ever increasing needs of our clients to access reinsurance for the specific needs of their programs.

**United Self Insurance Services (USIS)** – Another Brown & Brown subsidiary that provides workers compensation administration services to over 2000 employees in the Florida including many governmental entities.

If third party administration is requested, we can coordinate this as well by investigating options of other third party administrators for workers compensation, general liability and auto liability.

We pride ourselves on performing as an extension of the City's risk management department..

Brown & Brown participates in and supports organizations dedicated to risk management and finance in the municipal sector including Florida PRIMA, So Florida PRIMA, National PRIMA, Florida RIMS, and National RIMS.



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# SECTION 5.2 (5)

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## **Qualifications/Experience of the Broker/Firm (cont'd)**

**What size clients does your firm generally represent?** Our public entity firms range from \$250,000 annual P&C premiums to \$1,700,000+ annual P&C premiums (per client).

**Describe what makes your firm uniquely qualified to work on City's account:** We have over 79 years combined experience on the local level serving our Public Entity clients. We understand and partner with public entities to provide cost effective solutions to meet their insurance and risk management needs. We service all lines of public entity exposures including large property schedules, general liability, public official's liability, law enforcement, employment practices, automobile, workers' comp, excess workers comp, flood, bonds, and other ancillary coverages such as tenant users liability, special events, cyber liability and environmental. We are experienced in first dollar programs as well as SIR's (Self Insured Retentions), large deductibles and self-funded pooling programs. Some of our clients include, City of Homestead, City of Florida City, City of Key Colony Beach and the City of North Miami among others. We have a keen focus on the public entity market, a focus typified by the Chairman of the Brown & Brown board as Speaker of the Florida's House of Representatives in 1979 and 1980.

**Describe a situation where you went above and beyond to meet your client's service needs (such as those of interest to the City of North Miami).**

Although we currently only insure the City's Excess Workers' Compensation (WC), we avail our services to the risk management department on a variety of non WC related issues, questions and information requests.

Example: Researched question relative to wetlands permitting and insurance requirements by reaching out to an attorney specializing in this area and a consultant in Tallahassee, as well as researched related websites and sought feedback from various public entity and environmental underwriters.

Example: One of our public entity clients did not have the manpower to produce a schedule of vehicles as their system was not computerized. We sent personnel to the City to go through boxes of vehicle registrations and create a master auto schedule.

**Provide any available record of performance rating for service rendered to current clients:** [See Page #32](#)

**Provide a summary of the firm's financial resources showing stability (include the latest year's audited financial statements & annual report:** [2018 Annual Report is Exhibit A](#)

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## SECTION 5.2 (5)

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### **Qualifications/Experience of the Broker/Firm (Cont'd)**

**Discuss any impending changes in the firm that could impact delivery of services:** [None](#)

**Location of office that will handle the City's account and number of professional staff:** [1780 N. Krome Avenue, Homestead, FL 33030 with 44 professional staff.](#)

**Provide Listing of all lawsuits or proceedings involving the Respondent within the past ten (10 years):** [Information regarding pending litigation is available in our public filings with the Securities and Exchange Commission.](#)

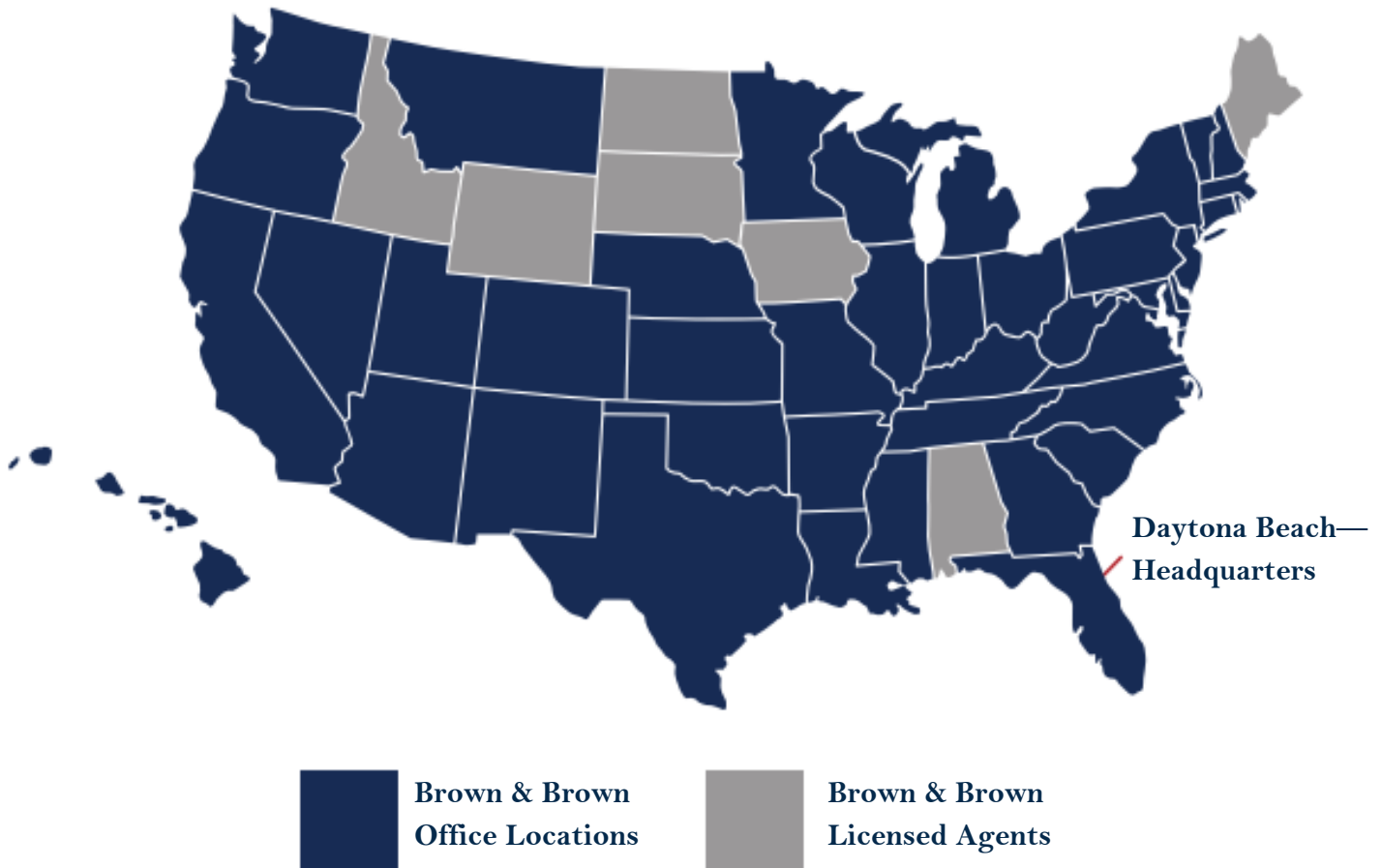
**Provide proof that your firm carries the required insurance referenced in this RFP (refer to section 2.7):** [We are an approved vendor for the City, meet or exceed insurance requirements: See Certificate of insurance on Page #40](#)

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## SECTION 5.2 (5)

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### Qualification of Broker/Firm



Brown & Brown has over 9,500 teammates in 291+ offices that span the United States, Bermuda, Canada and the United Kingdom.

**Brown & Brown Has National Strength With A Local Presence.**

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## SECTION 5.2 (5)

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### Qualification of Broker/Firm Key Differentiators



#### Engagement

Giving you more control, evidence and options



- Semi-annual meetings to discuss City's projections, exposure changes, current market conditions, service quality and claims review
- Working together to develop a market strategy to ensure we are on the same page for renewals
- Offering loss sensitive renewal plan options



#### Protective Services

Our collective success is earned by creating the perfect solution for you



- Proactive rather than reactive
- Continuous loss control efforts and loss control review.
- Continued participation on City's Accident Review Boards by Chris Kittleson, Sr. Loss Control Consultant, Public Risk Underwriters.

# SECTION 5.2 (5)

## Qualification of Broker/Firm Key Differentiators

Any broker can say they are “different”, but can they prove it?



### Benchmarking

Utilizing advanced analytics to qualify the impacts on your business



- We have the capability through our B&B subsidiary, Beecher Carlson to offer Predictive Analytics.
- Optimize - casualty analytics platform
- Cyber In-Site Models
- MARA - Determines limit adequacy
- Novus - ease of communication, collaboration, and connection between clients, carriers, and the broker



### Market Summary

Unique approach to marketing, leveraging our relationships



- Over 20 billion dollars of premium placed with our partner carriers
- Due to our size, there are no premium quotas; this allows us the ability to move clients to the best-fit carrier
- Dedicated team of marketing professionals to ensure a thorough marketing effort prior to renewal

# Carrier Relationships

The carrier relationships we form at the national level power our ability to deliver the personalized service from a local agency and exceptional peace-of-mind protection from a top 10 brokerage firm. In addition, strong ties with carriers enable us to provide superior and sustainable solutions for your business and personal assets. We negotiate and advocate for you to consistently receive the best results possible. Our approach to effective solutions provides a greater flexibility to develop long-lasting partnerships with carriers tailored to your specific needs.

We are proud to be affiliated with a wide range of the top-rated national and regional insurance carriers including many of the most respected companies in the industry. Below please find the annual insurance premiums placed with some of our top carriers.

## Top 10 Property and Casualty Markets

**2 B**  
**Revenue**

**22+ B**  
**Premium**

- |   |  |
|---|--|
| 1. Hartford Financial Services Group Inc. | 6. Liberty Mutual Holding Company Inc. |
| 2. Travelers Companies Inc.               | 7. Chubb Insurance Cos.                |
| 3. FCCI Mutual Insurance Holdings Company | 8. American International Group Inc.   |
| 4. Zurich North America                   | 9. Nationwide Mutual Insurance Company |
| 5. Amtrust Financial Services Inc.        | 10. Tokio Marine Holdings Inc.         |

## Top 10 Public Entity Markets

- |                                       |                                 |
|---------------------------------------|---------------------------------|
| 1. Preferred Risk Underwriters (PGIT) | 6. Wright Specialty Ins. Co.    |
| 2. Apex/ QBE                          | 7. American International Group |
| 3. Travelers Companies Inc.           | 8. Arch Ins. Co.                |
| 4. Public Risk Managers (PRM)         | 9. Markel                       |
| 5. Liberty Mutual Ins. Group          | 10. ACE/Chubb                   |

# SECTION 5.2 (5)

## Qualification of Broker/Firm Financial Status/Stability

### Segment Overview - Retail

#### Key Metrics

	2017	Avg. 3 Yr.	Avg. 5 Yr.
Revenue Growth	2.8%	4.6%	7.7%
Organic Revenue Growth	2.9%	2.1%	1.9%
EBITDAC Margin	30.0%	31.0%	31.4%
Revs/Teammate (in thousands) <sup>1</sup>	\$235.5	\$231.4	\$228.0

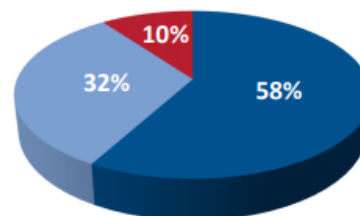
#### Differentiation

- Culture of ownership & entrepreneurial thinking
- Breadth & depth of capabilities available to customers from small businesses to large multi-national entities
- Delivering solutions across all lines of business for our customers with proximity to their markets
- Specialized products tailored to meet our customers specific needs



<sup>1</sup> Represents total revenues divided by the average number of full-time equivalent employees at the beginning of the year and the number of full-time equivalent employees at the end of the year.  
See important disclosures regarding Non-GAAP measures on page 2 and Non-GAAP reconciliations on pages 53-64

#### Business Mix



■ Commercial Lines ■ Employee Benefits ■ Personal Lines

#### Market Profile

- Hundreds of thousands of middle market businesses ensuring low customer concentration
- Customer base values advice & service that can be difficult for small, local competitors to provide
- Highly fragmented, providing attractive opportunity for market share growth
- Primary competition is the local broker/agent

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# SECTION 5.2 (5)

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## Qualification of Broker/Firm Financial Status/Stability

### Breadth & Depth Of Expertise

INDUSTRY	Customers span hundreds of industry classifications with 14 primary industries
COVERAGE	Coverage placed for almost every line, with 15 primary lines
MARKETS	Placing coverage for 1,000+ carrier partners & with 50 significant carriers

The Retail Segment provides broad and deep expertise to our customers, while maintaining close proximity to the communities in which our customers operate their businesses.



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# SECTION 5.2 (5)

## Qualification of Broker/Firm Financial Status/Stability

### Capabilities



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# SECTION 5.2 (5)

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## Qualification of Broker/Firm Financial Status/Stability

### Investing For The Future

<b>CAPABILITIES</b>	<ul style="list-style-type: none"><li>• Employee benefits technology &amp; compliance tools</li><li>• Customer experience</li><li>• Acquisitions</li></ul>
<b>TECHNOLOGY</b>	<ul style="list-style-type: none"><li>• Data &amp; analytics</li><li>• Standardized agency management platform</li><li>• Operational efficiency</li></ul>
<b>TEAMMATES</b>	<ul style="list-style-type: none"><li>• Ownership</li><li>• Producer incentives</li><li>• Brown &amp; Brown University</li></ul>

The Retail Segment continuously invests in our business to develop teammates, increase capabilities, and enhance operational effectiveness in order to deliver world-class solutions & service to our customers.



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# SECTION 5.2 (5)

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## Qualification of Broker/Firm Financial Status/Stability



# SECTION 5.2 (5)

## Qualification of Broker/Performance Evaluations

Vendor Performance Evaluation				
<p><b>Instructions:</b> Use this form to evaluate the overall performance of vendors you are currently working with. Include all information associated with the vendor and apply a performance rating. Definitions are provided below. Be factual and do not include unsubstantiated opinions. Vendor performance evaluations are recommended for all vendors to report all levels of service (exceptional, satisfactory or unsatisfactory). Vendors receiving an overall unsatisfactory rating will be informed of the rating by the Procurement Office and they will be provided a reasonable opportunity to respond. The department will be informed of the resolution.</p>				
Vendor Name: Brown & Brown of Florida			Date: 6.11.19	
Department: Thomas R. Jones' Service Team			Contract No:	
Definitions of Performance Ratings				
<b>EXCEPTIONAL</b> Exceeds contractual requirements. The actions taken by the vendor met the contractual requirements and the scopes of services were accomplished.	<b>SATISFACTORY</b> Meets contractual requirements. The actions taken by the vendor were Satisfactory.	<b>UNSATISFACTORY</b> Does not meet contractual requirements, and recovery is not likely in a timely manner. The vendor's corrective actions appear or were ineffective.	<b>N/A</b> Not Applicable	<b>INSUFFICIENT INFORMATION TO RATE</b> There is not sufficient information to rate performance.
Performance Rating			Comments	
Work performed in compliance with contract terms	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate			
Materials, supplies and equipment provided as required?	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate			
Staff availability	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate			
Timeliness of work	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate			
Staff professionalism	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate			

Performance Rating		Comments
Customer Service	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Quality of Work	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Communication and Accessibility	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Prompt and effective correction of situations and conditions	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Contractor compliance with Wage & Benefits (if appropriate)	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Documentation records, receipts, invoices and computer generated reports received in a timely manner and in compliance with contract specifications	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Would you recommend using this firm again?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	

**OVERALL PERFORMANCE**

- ☒ Exceptional  
☐ Satisfactory  
☐ Unsatisfactory

Evaluator Name: Kerry Ann Napoles

Evaluator Company: City of Florida City

Signature: Knapoles

Date: 6-11-19

## Vendor Performance Evaluation

**Instructions:** Use this form to evaluate the overall performance of vendors you are currently working with. Include all information associated with the vendor and apply a performance rating. Definitions are provided below. Be factual and do not include unsubstantiated opinions. Vendor performance evaluations are recommended for all vendors to report all levels of service (exceptional, satisfactory or unsatisfactory). Vendors receiving an overall unsatisfactory rating will be informed of the rating by the Procurement Office and they will be provided a reasonable opportunity to respond. The department will be informed of the resolution.

Vendor Name: Brown & Brown of Florida

Date: 6/11/19

Department: Thomas R. Jones' Service Team

Contract No: Insurance Broker/Provider since 2009

### Definitions of Performance Ratings

<b>EXCEPTIONAL</b> Exceeds contractual requirements. The actions taken by the vendor met the contractual requirements and the scopes of services were accomplished.	<b>SATISFACTORY</b> Meets contractual requirements. The actions taken by the vendor were Satisfactory.	<b>UNSATISFACTORY</b> Does not meet contractual requirements, and recovery is not likely in a timely manner. The vendor's corrective actions appear or were ineffective.	<b>N/A</b> Not Applicable	<b>INSUFFICIENT INFORMATION TO RATE</b> There is not sufficient information to rate performance.
--	---	---	------------------------------	---

Performance Rating	Comments
Work performed in compliance with contract terms <input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Materials, supplies and equipment provided as required? <input type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input checked="" type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	N/A, insurance services are provided.
Staff availability <input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	Extremely accessible and available to answer questions and assist in any manner.
Timeliness of work <input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	They have always met our deadlines.
Staff professionalism <input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	Brown & Brown / TR Jones' team have been extremely professional, knowledgeable and are a pleasure to work with.



Performance Rating		Comments
Customer Service	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	Each year, our staff looks for ways to add value and reduce costs. Brown & Brown has gone above and beyond to find ways for the District to reduce our insurance expenses.
Quality of Work	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	We have always been very satisfied with the quality of work.
Communication and Accessibility	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	Staff is accessible, easy to work with and great communication.
Prompt and effective correction of situations and conditions	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Contractor compliance with Wage & Benefits (if appropriate)	<input type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input checked="" type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Documentation records, receipts, invoices and computer generated reports received in a timely manner and in compliance with contract specifications	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Would you recommend using this firm again?	<input checked="" type="checkbox"/> Yes	

**OVERALL PERFORMANCE**

- ☒ Exceptional  
☐ Satisfactory  
☐ Unsatisfactory

Evaluator Name: Connie Fazio

Evaluator Company: Key Largo Wastewater Treatment District

Signature:

*Connie Fazio*  
Finance Manager

Date: 6/11/19

## Vendor Performance Evaluation

**Instructions:** Use this form to evaluate the overall performance of vendors you are currently working with. Include all information associated with the vendor and apply a performance rating. Definitions are provided below. Be factual and do not include unsubstantiated opinions. Vendor performance evaluations are recommended for all vendors to report all levels of service (exceptional, satisfactory or unsatisfactory). Vendors receiving an overall unsatisfactory rating will be informed of the rating by the Procurement Office and they will be provided a reasonable opportunity to respond. The department will be informed of the resolution.

Vendor Name: Brown & Brown of Florida Date: 6/12/19

Department: Thomas R. Jones' Service Team Contract No:

### Definitions of Performance Ratings

<b>EXCEPTIONAL</b> Exceeds contractual requirements. The actions taken by the vendor met the contractual requirements and the scopes of services were accomplished.	<b>SATISFACTORY</b> Meets contractual requirements. The actions taken by the vendor were Satisfactory.	<b>UNSATISFACTORY</b> Does not meet contractual requirements, and recovery is not likely in a timely manner. The vendor's corrective actions appear or were ineffective.	<b>N/A</b> Not Applicable	<b>INSUFFICIENT INFORMATION TO RATE</b> There is not sufficient information to rate performance.
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### Performance Rating

### Comments

Work performed in compliance with contract terms	<input type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input checked="" type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Materials, supplies and equipment provided as required?	<input type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input checked="" type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Staff availability	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	The Broker and Staff have been readily available for questions; attendance at public meetings and for assistance with claims.
Timeliness of work	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Staff professionalism	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	



Performance Rating		Comments
Customer Service	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Quality of Work	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Communication and Accessibility	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Prompt and effective correction of situations and conditions	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Contractor compliance with Wage & Benefits (if appropriate)	<input type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input checked="" type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Documentation records, receipts, invoices and computer generated reports received in a timely manner and in compliance with contract specifications	<input type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Would you recommend using this firm again?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	

**OVERALL PERFORMANCE**

- ☒ Exceptional  
☐ Satisfactory  
☐ Unsatisfactory

Evaluator Name:

VIVIAN MANACH

Evaluator Company:

CITY OF HOMESTEAD

Signature:

*[Handwritten Signature]*

Date:

6/12/19

## Vendor Performance Evaluation

**Instructions:** Use this form to evaluate the overall performance of vendors you are currently working with. Include all information associated with the vendor and apply a performance rating. Definitions are provided below. Be factual and do not include unsubstantiated opinions. Vendor performance evaluations are recommended for all vendors to report all levels of service (exceptional, satisfactory or unsatisfactory). Vendors receiving an overall unsatisfactory rating will be informed of the rating by the Procurement Office and they will be provided a reasonable opportunity to respond. The department will be informed of the resolution.

Vendor Name: Brown & Brown of Florida

Date: 6/12/19

Department: Thomas R. Jones' Service Team

Contract No:

### Definitions of Performance Ratings

<b>EXCEPTIONAL</b> Exceeds contractual requirements. The actions taken by the vendor met the contractual requirements and the scopes of services were accomplished.	<b>SATISFACTORY</b> Meets contractual requirements. The actions taken by the vendor were Satisfactory.	<b>UNSATISFACTORY</b> Does not meet contractual requirements, and recovery is not likely in a timely manner. The vendor's corrective actions appear or were ineffective.	<b>N/A</b> Not Applicable	<b>INSUFFICIENT INFORMATION TO RATE</b> There is not sufficient information to rate performance.
--	---	---	------------------------------	---

### Performance Rating

### Comments

Work performed in compliance with contract terms	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Materials, supplies and equipment provided as required?	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Staff availability	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Timeliness of work	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Staff professionalism	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	

Performance Rating		Comments
Customer Service	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Quality of Work	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Communication and Accessibility	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Prompt and effective correction of situations and conditions	<input checked="" type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Contractor compliance with Wage & Benefits (if appropriate)	<input type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Documentation records, receipts, invoices and computer generated reports received in a timely manner and in compliance with contract specifications	<input type="checkbox"/> Exceptional <input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory <input type="checkbox"/> N/A <input type="checkbox"/> Insufficient info. to rate	
Would you recommend using this firm again?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	

**OVERALL PERFORMANCE**

- ☒ Exceptional  
☐ Satisfactory  
☐ Unsatisfactory

*Been with Kathy Nicotro for 22 plus years. will not change*

Evaluator Name: *Jonathan Hegler CFO*

Evaluator Company: *The Redland Company*

Signature: *[Signature]*

Date: *6/12/19*



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

03/28/2019

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Brown & Brown of Florida, Inc. 220 South Ridgewood Avenue  Daytona Beach FL 32114	<b>CONTACT NAME:</b> Laurie Kohler <b>PHONE (A/C, No, Ext):</b> (386) 239-7242 <b>FAX (A/C, No):</b> (386) 323-9159 <b>E-MAIL ADDRESS:</b> lkohler@bbdaytona.com														
<b>INSURED</b> BROWN & BROWN INC ETAL Po Box 2412  Daytona Beach FL 32115	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="text-align: left;">INSURER(S) AFFORDING COVERAGE</th> <th style="text-align: left;">NAIC #</th> </tr> <tr> <td>INSURER A: Travelers Property Casualty Company of America</td> <td>25674</td> </tr> <tr> <td>INSURER B: The Continental Insurance Company</td> <td>35289</td> </tr> <tr> <td>INSURER C: XL Specialty Insurance Company</td> <td>37885</td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Travelers Property Casualty Company of America	25674	INSURER B: The Continental Insurance Company	35289	INSURER C: XL Specialty Insurance Company	37885	INSURER D:		INSURER E:		INSURER F:	
INSURER(S) AFFORDING COVERAGE	NAIC #														
INSURER A: Travelers Property Casualty Company of America	25674														
INSURER B: The Continental Insurance Company	35289														
INSURER C: XL Specialty Insurance Company	37885														
INSURER D:															
INSURER E:															
INSURER F:															

**COVERAGES**
**CERTIFICATE NUMBER:** 2019-20

**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			TC2JGLSA9527B87419	01/01/2019	01/01/2020	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMPIOP AGG \$ 2,000,000 \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			TC2JCAP9527B86219	01/01/2019	01/01/2020	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ Combined single limit \$
	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED \$ RETENTION \$			6011849429	01/01/2019	01/01/2020	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y/N If yes, describe under DESCRIPTION OF OPERATIONS below			TC2JUB9517B58019	01/01/2019	01/01/2020	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
C	INS AGENTS E&O			ELU15939919	01/01/2019	01/01/2020	LIMIT 20,000,000 AGGREGATE 20,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

NAMED INSURED: BROWN & BROWN OF FLORIDA, INC.  
 CITY OF NORTH MIAMI IS ADDITIONAL INSURED ON THE GENERAL LIABILITY, PER FORM CG D2 48 08 05.

**CERTIFICATE HOLDER**
**CANCELLATION**

CITY OF NORTH MIAMI  776 NE 125TH STREET NORTH MIAMI FL 33161	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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ACORD 25 (2016/03)

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# ADDITIONAL REMARKS SCHEDULE

AGENCY Brown & Brown of Florida, Inc.		NAMED INSURED BROWN & BROWN INC ETAL
POLICY NUMBER		
CARRIER	NAIC CODE	EFFECTIVE DATE:

## ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,

FORM NUMBER: \_\_\_\_\_ FORM TITLE: : Notes

INSURER A-WORKERS COMPENSATION-POLICY TRJUB9518B76119-TRAVELERS INDEMNITY-EFF 1-1-19 TO 1-1-20, LIMITS  
 1,000,000/1,000,000/1,000,000







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# SECTION 5.2 (6)

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## Qualifications/Experience of Personnel

**Briefly describe your firm's history and background** T. R. Jones & Co., a Division of Brown & Brown of Florida, Inc. has origins that date back to 1947. We are deeply rooted in our community, and are wholly owned by Brown & Brown, Inc., one of the largest independent insurance intermediary organizations in both the U.S. and the world (based on the July 2014 ranking by *Business Insurance* Magazine.) The Company is a publicly owned corporation with its stock traded on the New York Stock Exchange under the symbol BRO (NYSE:BRO).

We are located at 1780 N. Krome Avenue in Homestead, Florida and Key Largo. Our offices provide primarily property/casualty insurance and employee benefit products and services to our clients who range from Governmental entities to private businesses and individuals. Our office is operated as an entrepreneurial entity, making it possible to respond rapidly to the needs of our local customers, with local decision making and knowledge.

Brown & Brown and its subsidiaries offer a broad range of insurance products and services, as well as risk management, third party administration, managed health care and Medicare set-aside services and programs. Providing service to business, public entity, individual, trade and professional association clients nationwide, the Company is highly regarded for its 80 years of proven experience in providing the programs necessary to properly protect every type of business enterprise.

The National Public Entity Division of Brown & Brown has in excess of 400 public entity, counties and school board clients in Florida alone and is one of the largest providers of insurance and risk management services to the public entity sector in the State of Florida.



6th	2.0 B	291	80+
Sixth largest independent insurance brokerage in the nation as ranked by <i>Business Insurance</i>	Revenues are greater than \$2.0 B and premiums sales that exceed \$22 B	Employs more than 9,500 teammates with 291+ locations across the globe	Providing superior services to customers for more than 80 years

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# SECTION 5.2 (6)

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## Qualifications/Experience of Personnel (Cont'd)

Provide copies of all insurance licenses for Respondent's Brokers/staff, allowing the transaction of insurance sales/service in the State of Florida: [See licenses and bios beginning on Page #46](#)

Brown & Brown's mission calls for each of our people to recognize and fulfill the needs of every individual client. This includes recognizing the impact of all recommendations in a difficult and changing world. We fulfill this mission every day through creative underwriting at highly competitive prices and with urgent attention to all claims and details of the City's account.

Our team is trained specifically in the needs and special requirements of public entities. For example, specific knowledge and understanding is necessary in order to issue certificates of insurance that meet the legal requirements of the State's Sovereign Immunity Statute, 768.28. Our staff can also provide immediate advice on issues such as; hold harmless agreements, insurance clauses within contracts, insurance requirements for contractors, special event coverage, workers' compensation law, and coverage questions .

We understand the breadth and implication of Florida Statute 768.28. This understanding is especially important in regards to requests from third parties for status as an additional insured on existing policies. We will not extend the City's insurance coverage solely based on a request from a contractor or vendor. Private entities do not have the protection of sovereign immunity and therefore pose a higher risk than a public entity would. The staff at Brown & Brown undertakes a meticulous process to ensure that insurance coverage is not extended to third parties haphazardly

**Service Commitment:** Your Brown & Brown Team is committed to providing daily and continuous service that exceeds your expectations. We are proud of the reputation of excellence that we have earned as a supplier of insurance and risk manager to Florida's public entities. This reputation is evident in our ability to retain 97% of our clients. We promise our clients that we will:

- Return phone calls within 24 hours (usually within the hour)
- Issue Certificates of insurance within 24 hours
- Provide loss run reports on a quarterly basis
- Review loss runs at least quarterly with our client
- Proactively pursue loss control methods that reduce insurance costs
- Assist in establishing loss control practices, rules and manuals
- Coordinate training for employees, supervisors, management, and public officials



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# SECTION 5.2 (6)

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## Qualifications/Experience of Personnel-Team Structure

Licensed Insurance Agent



# Thomas R. Jones Jr.

## Executive Vice President, Agent

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Tom Jones was President of T.R. Jones & Company and formerly Executive Managing Director for Beecher Carlson's Florida operations until 2010 when the company was purchased by Brown & Brown. Tom uses his 46 years of experience in the Florida market to design unique solutions and placements that leverage his long-term carrier and customer relationships.

Tom has developed a diverse background in the production of public entity, construction, municipal, healthcare, agricultural, habitation and nonprofit business accounts. Tom's use of analytical tools and innovative solutions for large property schedules have mitigated the impact of the adverse market conditions over the years..

Tom holds a Bachelor of Science Degree in Psychology from Florida Southern College. As an active member of the Miami Dade community, Tom is involved in numerous civic organizations and served as the Chair of the Capital Campaign for the newly constructed Homestead Hospital, a part of Baptist Health Systems, Past President of the Homestead Rotary Club, and member of Homestead Military Affairs Committee & Past Deacon of the First Presbyterian Church of Homestead.

## FLORIDA DEPARTMENT OF FINANCIAL SERVICES

**THOMAS RANDOLPH JONES JR**

*License Number : A133840*

### Resident Insurance License

- 0216 - LIFE
- 0240 - HEALTH
- 0220 - GENERAL LINES (PROP & CAS)
- 0218 - LIFE & HEALTH

### Issue Date

01/28/1964  
01/28/1964  
09/16/1974  
01/28/1964

#### Please Note:

A licensee may only transact insurance with an active appointment by an eligible insurer or employer. If you are acting as a surplus lines agent, public adjuster, or reinsurance intermediary manager/broker, you should have an appointment recorded in your own name on file with the Department. If you are unsure of your license status you should contact the Florida Department of Financial Services immediately. This license will expire if more than 48 months elapse without an appointment for each class of insurance listed. If such expiration occurs, the individual will be required to re-qualify as a first-time applicant. If this license was obtained by passing a licensure examination offered by the Florida Department of Financial Services, the licensee is required to comply with continuing education requirements contained in 626.2815 or 648.385, Florida Statutes. A licensee may track their continuing education requirements completed or needed in their MyProfile account at <https://dfoe.fidfs.com>. To validate the accuracy of this license you may review the individual license record under "Licensee Search" on the Florida Department of Financial Services website at <http://www.MyFloridaCFO.com/Division/Agents>



Jimmy Patronis  
Chief Financial Officer  
State of Florida

# Kathy Nicotra, ACSR

## Account Executive

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Kathy is a licensed 2-20 property and casualty agent with over 37 years' experience in the insurance industry. Her expertise includes underwriting and risk placement of large commercial accounts. Additionally, her role includes account management and coordination, implementation of service plans claims liaison and loss analysis. Kathy is responsible for working in partnership with some of the agency's largest clients. She is experienced in a variety of businesses such as public entity, quasi-governmental risks, agriculture, complex construction accounts, large real estate, wholesale risks and large non-profit organizations.

During her tenure with the agency, she has served on the Board of Directors of the Independent Agents of Dade County, Chairperson of the Florida Association of Insurance Agents Catastrophe Committee, Board of Directors for the Homestead Soup Kitchen, City of Homestead Historical Preservation Board, Miami-Dade Co. Emergency Management Insurance Catastrophe Liaison and volunteered for Hurricane Katrina Catastrophe Assistance in Bay St. Louis, Mississippi. She has also served on the Board of the First Presbyterian Church of Homestead and Past Chairman & current board member of the YMCA of South Florida Homestead family center .

## FLORIDA DEPARTMENT OF FINANCIAL SERVICES

**KATHY M NICOTRA**

**License Number : A192175**

### Resident Insurance License

• 0220 - GENERAL LINES (PROP & CAS)

### Issue Date

07/30/2001

#### Please Note:

A licensee may only transact insurance with an active appointment by an eligible insurer or employer. If you are acting as a surplus lines agent, public adjuster, or reinsurance intermediary manager/broker, you should have an appointment recorded in your own name on file with the Department. If you are unsure of your license status you should contact the Florida Department of Financial Services immediately. This license will expire if more than 48 months elapse without an appointment for each class of insurance listed. If such expiration occurs, the individual will be required to re-qualify as a first-time applicant. If this license was obtained by passing a licensure examination offered by the Florida Department of Financial Services, the licensee is required to comply with continuing education requirements contained in 626.2615 or 648.365, Florida Statutes. A licensee may track their continuing education requirements completed or needed in their MyProfile account at <https://dofcs.fds.com>. To validate the accuracy of this license you may review the individual license record under "Licensee Search" on the Florida Department of Financial Services website at <http://www.MyFloridaCFO.com/Division/Agents>



Jimmy Patronis  
Chief Financial Officer  
State of Florida

# Michelle Wilson, AAI, AINS, AIS

## Account Manager

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Michelle is a licensed 2-20 property and casualty agent with over 16 years' experience in the insurance industry. Her expertise includes service administration of large commercial accounts. She is currently servicing other public entity accounts and is familiar with the service needs of this class of business.

Michelle has experience in various agency disciplines including sales. Her sales experience uniquely positions her to the service needs of our public entity clients as she has been in the field and worked closely with our client's staff. She understands and anticipates client's needs.

## FLORIDA DEPARTMENT OF FINANCIAL SERVICES

***MICHELLE VANESSA WILSON***

***License Number : E173476***

### **Resident Insurance License**

- 0220 - GENERAL LINES (PROP & CAS)

### **Issue Date**

05/20/2008

#### **Please Note:**

A licensee may only transact insurance with an active appointment by an eligible insurer or employer. If you are acting as a surplus lines agent, public adjuster, or reinsurance intermediary manager/broker, you should have an appointment recorded in your own name on file with the Department. If you are unsure of your license status you should contact the Florida Department of Financial Services immediately. This license will expire if more than 48 months elapse without an appointment for each class of insurance listed. If such expiration occurs, the individual will be required to re-qualify as a first-time applicant. If this license was obtained by passing a licensure examination offered by the Florida Department of Financial Services, the licensee is required to comply with continuing education requirements contained in 626.2815 or 648.385, Florida Statutes. A licensee may track their continuing education requirements completed or needed in their MyProfile account at <https://dfoe.fidfs.com>. To validate the accuracy of this license you may review the individual license record under "Licensee Search" on the Florida Department of Financial Services website at <http://www.MyFloridaCFO.com/Division/Agents>



Jimmy Patronis  
Chief Financial Officer  
State of Florida



# Alina Menendez

## Assistant Account Manager

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Alina is a licensed 4-40 property and casualty representative. Alina has a background in office management for a title company including responsibilities such as HR, accounting and benefits management. She worked closely with city, county, state and federal government offices on various projects and contract negotiations. Alina's current responsibilities includes assisting the account manager on the day to day servicing of the City's account.

## FLORIDA DEPARTMENT OF FINANCIAL SERVICES

**ALINA MENENDEZ**

**License Number : W504072**

### Resident Insurance License

• 0440 - CUSTOMER REPRESENTATIVE

### Issue Date

08/06/2018

#### Please Note:

A licensee may only transact insurance with an active appointment by an eligible insurer or employer. If you are acting as a surplus lines agent, public adjuster, or reinsurance intermediary manager/broker, you should have an appointment recorded in your own name on file with the Department. If you are unsure of your license status you should contact the Florida Department of Financial Services immediately. This license will expire if more than 48 months elapse without an appointment for each class of insurance listed. If such expiration occurs, the individual will be required to re-qualify as a first-time applicant. If this license was obtained by passing a licensure examination offered by the Florida Department of Financial Services, the licensee is required to comply with continuing education requirements contained in 626.2815 or 648.385, Florida Statutes. A licensee may track their continuing education requirements completed or needed in their MyProfile account at <https://dcoe.fdfs.com>. To validate the accuracy of this license you may review the individual license record under "Licensee Search" on the Florida Department of Financial Services website at <http://www.MyFloridaCFO.com/Division/Agents>.



Jimmy Patronis  
Chief Financial Officer  
State of Florida

# Christopher H. Kittleson, ARM

## Sr. Loss Control Consultant– PRU

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Christopher H. Kittleson joined Public Risk Underwriters of Florida, Inc. as a Sr. Risk Control Consultant in 2010 and provides Loss Control services for the southern Florida region. With over 19 years of safety & health consulting experience Chris has developed industry expertise in the areas of Construction, Manufacturing and USL&H as well as safety programming expertise in the areas of Safety Program Development, Return to Work Programs, Regulatory Compliance, Accident Investigation and Safety Training. Prior to working in the Insurance industry Chris' career was with IBM where he held various Engineering positions. Chris graduated Cum Laude from St. Cloud State University; St. Cloud, MN with a Bachelor's of Science in Engineering Technology, has earned his Associate in Risk Management (ARM) designation, is a Professional Member of the American Society of Safety Engineers (ASSE) and was awarded the 2013 Safety Professional of the Year Award by the South Florida Chapter of ASSE.

# Reinaldo “Rey” Artiles

## Claims Advocate

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- Bachelor Degree in Political Science from Florida International University
- Florida Licensed Property and Casualty Agent
- Brown and Brown University Graduate in Property & Casualty Sales & Technical Sales School
- Member of the Business Networking International (BNI-Pioneers Chapter)
- Member of the South Dade Chamber of Commerce
- Member of the Greater Miami Chamber of Commerce
- Member of the Miami Gardens Chamber of Commerce

Reinaldo is a licensed 2-20 property and casualty agent with over 3 years' experience in the insurance industry. He understands the claim process and follows through until the day it closes. Working alongside veteran agents, he has serviced large public and private accounts. Personable and attentive, Reinaldo has created professional relationships with carrier adjusters and has quickly become an advocate to our insureds and a valuable asset to the agency.

## FLORIDA DEPARTMENT OF FINANCIAL SERVICES

***REINALDO ARTILES JR***

***License Number : W444385***

### **Resident Insurance License**

- 0220 - GENERAL LINES (PROP & CAS)

### **Issue Date**

10/27/2017

#### **Please Note:**

A licensee may only transact insurance with an active appointment by an eligible insurer or employer. If you are acting as a surplus lines agent, public adjuster, or reinsurance intermediary manager/broker, you should have an appointment recorded in your own name on file with the Department. If you are unsure of your license status you should contact the Florida Department of Financial Services immediately. This license will expire if more than 48 months elapse without an appointment for each class of insurance listed. If such expiration occurs, the individual will be required to re-qualify as a first-time applicant. If this license was obtained by passing a licensure examination offered by the Florida Department of Financial Services, the licensee is required to comply with continuing education requirements contained in 626.2815 or 648.385, Florida Statutes. A licensee may track their continuing education requirements completed or needed in their MyProfile account at <https://dicoe.fdfs.com>. To validate the accuracy of this license you may review the individual license record under "Licensee Search" on the Florida Department of Financial Services website at <http://www.MyFloridaCFO.com/Division/Agents>



Jimmy Patronis  
Chief Financial Officer  
State of Florida

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# SECTION 5.2 (7)

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## Expertise & Approach to the Services Required by this RFP

**An explanation of why the Respondent is best qualified to perform Contract requirements and demonstrate its qualifications including an item-by-item disclosure outlining how the firm meets or exceeds the requirements of this RFP:**

Brown & Brown has had a relationship with the City of North Miami for over twenty years (20). We have serviced the Public Officials/EPLI and Police Professional in prior years and currently service the Excess Workers' Compensation. We work with the City on a discounted fee. Chris Kittleson, with our affiliate firm of Preferred Risk Underwriters is very active on the City's accident review boards. We are always available to the City regarding any issue or matter that might arise. We think this long term relationship speaks volumes about our continued commitment to the City and the City staff, in particular, the Risk Management Department. If given the opportunity, we will continue our valued partnership and consider ourselves an extension of the City's Risk Management department providing support 24/7 for the day to day insurance and risk management related matters.

We are comfortable with the current carriers and coverages in place, however, we re-market lines of business as market conditions present an opportunity for enhanced coverages and premium savings. We continually evaluate the property and casualty public entity market place and trends as well as the legislative issues affecting public entities. Due to the power and reach of Brown & Brown's divisions behind our team we have access to virtually every public entity insurance program and perform extensive marketing efforts to maintain a cost effective approach to keep insurance costs within budgetary guidelines.

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# SECTION 5.2 (7)

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## Expertise & Approach to the Services Required by this RFP

**An explanation of why the Respondent is best qualified to perform Contract requirements and demonstrate its qualifications including an item-by-item disclosure outlining how the firm meets or exceeds the requirements of this RFP: (Cont'd)**

We are confident that we will meet or exceed all insurance procurement and management services as outlined in the RFP Scope of Services, Section 3.0 Item 3.1. Items A-E.

1. Brown & Brown has National Strength with a Local presence. We currently insure over 400 public entities in Florida alone. The Homestead office has over 79 years combined experience on the local level servicing our Public Entity clients.
2. Sixth (6th) largest independent insurance brokerage in the nation.
3. We have unequalled access to the insurance marketplace and will secure the broadest array of options for the City.
4. Senior Loss Consultant currently participates in the City's Accident Review Board meetings.
5. Advanced analytics capability.
6. City's dedicated service team is experienced in the needs and special requirements of public entities. We have specific knowledge and understanding of legal requirements of the State's Sovereign Immunity Statute, 786.28.
7. Simply said we provide exceptional service which is evidenced by our client relationships that span 30-40 years.



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# SECTION 5.2 (8)

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## Commission/Fee

**Explain your preference and reason relating to how you desire to be compensated for services rendered.** Brown & Brown currently has a guaranteed fee in lieu of commission agreement with the City. The current fee for placement and servicing of the Excess Workers Compensation is \$10,000. If we are selected as your Broker of Record on all lines in this RFP, we will reduce the Workers' Compensation annual fee to \$7,500 and the fee for Public Officials/EPLI and Police Professional at \$20,000. This creates a savings to the City of \$11,200 in Brokerage fees and commissions.

**Has your firm been subject to any lawsuits or settlements specific to compensation disclosure or practices within the last five years? If yes, explain.**

Information regarding pending litigation is available in our public filings with the Securities and Exchange Commission.

**Does your firm have any reservations in making available "documents of commissions" received from insurers?**

We do not have any reservations in making these documents available for the lines of business we place for the City.

**What is your company's philosophy on accepting contingency/override compensation from insurers relative to placement of insurance?** In addition to the commissions or fees received by us for assistance with the placement, servicing, claims handling, or renewal of your insurance coverages, other parties, such as excess and surplus lines brokers, wholesale brokers, reinsurance intermediaries, underwriting managers and similar parties, some of which may be owned in whole or in part by Brown & Brown, Inc. may also receive compensation for their role in providing insurance products or services to you pursuant to their separate contracts with insurance or reinsurance carriers. That compensation is derived from your premium payments. Additionally, it is possible that we, or our corporate parents or affiliates, may receive contingent payments or allowances from insurers based on factors which are not client-specific, such as performance and/or size of an overall book of business produced with an insurer. We generally do not know if such a contingent payment will be made by a particular insurer, or the amount of any such contingent payments, until the underwriting year is closed. That compensation is partially derived from your premium dollars, after being combined (or "pooled") with the premium dollars of other insureds that have purchased similar types of coverage. We may also receive invitations to programs sponsored and paid for by insurance carriers to inform brokers regarding their products and services, including possible participation in company sponsored events such as trips, seminars, and advisory council meetings, based upon the total volume of business placed with the carrier you select. We may, on occasion, receive loans or credit from insurance companies. Additionally, in the ordinary course of our business, we may receive and retain interest on premiums you pay from the date we receive them until the date of premiums are remitted to the insurance company or intermediary. In the event that we assist with placement and other details of arranging for the financing of your insurance premium, we may also receive a fee from the finance company.





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# SECTION 5.2 (9)

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## References—FORM A

Indicate at least three (3) clients with whom the City may speak with during the evaluation phase. [See Form A-14 attached in the forms Section 5.3.](#)



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# SECTION 5.2 (10)

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## **Local Business Preference**

Not Applicable. See Forms Section 5.3, Form A-3.



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# SECTION 5.3

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## Contract Forms

See this section for required Contract Forms:

[Form A-1    Public Entity Crimes Affidavit](#)

[Form A-2    Non-Collusive Proposal Certificate](#)

[Form A-3    Local Preference Affidavit \(not applicable\)](#)

[Form A-3a    Statement of Intent](#)

[Form A-4    Questionnaire Instructions](#)

[Form A-5    Acknowledgement of Addenda](#)

[Form A-6    Disclosure of Subcontractors & Suppliers \(Not Applicable\)](#)

[Form A-7    Insurance Requirements—Certificate of Insurance](#)

[Form A-14    References](#)





**SWORN STATEMENT UNDER SECTION 287.133(3)(a),  
FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES**

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICER AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to City of North Miami  
[print name of public entity]  
by Norman L. Morris, Executive Vice President  
[print individual's name and title]  
for Norman L. Morris, Executive Vice President BROWN & BROWN of Florida Inc. dba T. R. Jones & Co.  
[print name of entity submitting sworn statement]  
whose business address is 1780 N. Krome Ave., Homestead, FL 33030  
and (if applicable) its Federal Employer Identification Number (FEIN) is 59-0691921 (If the  
entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: \_\_\_\_\_.)

2. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), **Florida Statutes**, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any business with any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), **Florida Statutes**, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
4. I understand that an "affiliate" as defined in Paragraph 287.133 (1)(a), **Florida Statutes**, means:
  1. A predecessor or successor of a person convicted of a public entity crime; or
  2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.
5. I understand that a "person" as defined in Paragraph 287.133(1)(e), **Florida Statutes** means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

6. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. **[indicate which statement applies.]**



Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.



The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.



The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. **[attach a copy of the final order]**

**I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.**

Norman L. Morris

Digitally signed by Norman L. Morris  
DN: cn=Norman L. Morris, o=Norman L. Morris, email=norman@normanl.com, c=US  
Date: 2019.06.12 11:29:44 -0400

**[signature]**

Sworn to and subscribed before me this 14<sup>th</sup> day of June, 2019

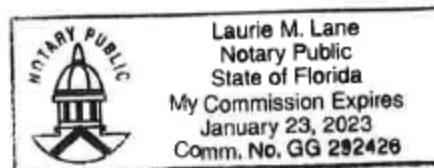
Personally known ☒

OR Produced identification \_\_\_\_\_ Notary Public - State of FLA.

(Type of Identification)

My commission expires 1-23-23

Laurie M. Lane  
(Printed typed or stamped Commissioned name of Notary Public)





**FORM "A-2"**

**NON-COLLUSIVE BIDDER CERTIFICATE**

STATE OF FLORIDA

COUNTY OF MIAMI-DADE

Before me, the undersigned authority, on this day personally appeared  
Norman L. Morris (Authorized Officer), who being by me  
duly sworn, deposes and says:

1. That he/she is the Executive Vice President of the corporation/partnership known and styles as Brown & Brown of Florida Inc. dba T.R. Jones & Co., duly formed under the laws of the State of Florida, on                     , 20      , is duly authorized to represent such corporation/partnership in the making of this Affidavit and certification.

2. That Brown & Brown of Florida Inc. dba T.R. Jones & Co. (corporation/partnership) has not, within 6 months next preceding the date of this affidavit, entered into any combination, contract, obligation, or agreement to create nor that may tend to create or to carry out any restriction on secret, competitive bidding on the procurement of RFP #57-18-19, to fix, maintain, increase, or reduce the price set out in the Proposal (bid) on the Project; to fix or maintain any standard or figure whereby the price bid in the Proposal is or has been in any manner affected, controlled, or established; or in any other manner to prevent or lessen competition in the bidding for the Project.

3. That Brown & Brown of Florida Inc. dba T.R. Jones & Co. (corporation/partnership) has not, during such time, entered into, executed, or carried out any contract, obligation, or agreement with any person, corporation, or association of persons not to bid on this Project below a common standard or figure, to keep the price thereof at fixed or graded figures, to preclude a fair and unrestricted competition in the bidding of this Project, to regulate, fix or limit the bidding on the Project, or to abstain from engaging in the bidding on the Project, or any portion thereof.

4. That Brown & Brown of Florida Inc. dba T.R. Jones & Co. (corporation/partnership) has not within 6 months next preceding the date of this Affidavit, either directly or through the instrumentality of trustees or otherwise, acquired assets shares, bonds, franchise, or other rights in or physical properties of any other corporation or partnership for the purpose of preventing or lessening, or in a manner that tends to affect or lessen, competition in the bidding on this Project.

5. That Brown & Brown of Florida Inc. dba T.R. Jones & Co. (corporation/partnership) has not within such time entered into any agreement or understanding to refuse to buy from or sell to any other person, corporation, firm, or association of person who bids on the Project.





## LOCAL BUSINESS PREFERENCE AFFIDAVIT

**THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICER AUTHORIZED TO ADMINISTER OATHS.**

### SECTION 1: GENERAL TERMS

#### Local Preference

The evaluation of competitive bids is subject to Section 7-151 of Ordinance 1244 which, except where contrary to federal and state law, or any other funding source requirements, provides that preference be given to local businesses. To satisfy this requirement, the vendor shall affirm in writing that it meets at least two (2) of the following objective criteria prior to the City's issuance of the Solicitation.

Business location means a permanent office or other site where the local business conducts, engages in, or carries on all or a portion of its business. A post office box or location at a postal service center shall not constitute a business location.

**At least two (2) of the following criteria must be met in order to qualify for local preference:**

1. A business that is located in the City of North Miami (City) with a current city business tax receipt issued prior to the City's issuance of the Solicitation for supplies or services **AND/OR**;
2. A business has at least ten (10%) of its total workforce residing in the City prior to the City's issuance of the solicitation for supplies or services **AND/OR**;
3. A business that subcontracts at least ten percent (10%) of the contractual amount of a City project with subcontractors who are physically located within the City.

**The offeror, supplier, or contractor seeking the local business preference has the burden to show that it qualifies for the preference, to the satisfaction of the City.**

The preference is used to evaluate the submittals received from bidders. Except where federal or state law mandates to the contrary, in the purchase of supplies or services in which objective factors used to evaluate the submittals received from offerors are assigned point totals, a preference of ten (10) percent of the total evaluation points, or ten (10) percent of the total price, shall be given to a local business.

#### Comparison of Qualifications

The preferences established in no way prohibit the right of the City to compare quality of supplies or services for purchase and to compare qualifications, character, responsibility and fitness of all persons, firms or corporations submitting bids or proposals. Further, the preference established in no way prohibit the right of the City from giving any other preference permitted by law instead of preferences granted, nor prohibit the City to select the bid or proposal which is the most responsible and in the best interests of the City.

### SECTION 2: AFFIRMATION

**Failure to fully complete this affidavit and to submit the requisite supporting documents may render the Vendor ineligible for Local Preference. Bidder/Respondent must check the applicable boxes below.**

**LOCAL PREFERENCE CERTIFICATION:** The local preference may be applied to businesses located within the limits of the City.

**NOTE: A copy of a current Business Tax Receipt must be submitted along with this bid or proposal.**

☐ Place a check mark here only if affirming bidder meets requirements for **Local Preference Certification**.

Revised 11/9/17

**WORKFORCE LOCAL PREFERENCE CERTIFICATION:** The local preference may be granted to businesses with a least ten percent (10%) of its total workforce residing within the geographical boundaries of the City.

**NOTE:** Must submit copy of current roster of all employees and provide proof of residence (Driver's License, Voter Registration Card, etc.) and proof of employment for those employees living within the City of North Miami.

☐ Place a check mark here only if affirming bidder meets requirements for **Workforce Local Preference Certification**.

**SUBCONTRACTOR LOCAL PREFERENCE CERTIFICATION:** The local preference may be granted to businesses that subcontract at least ten percent (10%) of the contractual amount of a City project to subcontractors who are physically located within the City of North Miami.

**NOTE:** Must submit a fully completed Form A-3(a): Statement of Intent signed by the respective subcontractor(s).

☐ Place a check mark here only if affirming bidder meets requirements for **Subcontractor Local Preference Certification**.

I certify that the information and responses on this form or attached hereto are true, accurate, and complete. I understand that the submittal of this form to the City's Purchasing Department is for this public entity only. I also understand that I am required to inform the City's Purchasing Department of any change in the information contained in this form or any attachments hereto.

Brown & Brown of FL, INC DBA T. R. Jones & Co  
Company Name

Norman L. Morris  
Print Name – Authorized Representative

Executive V.P.  
Title

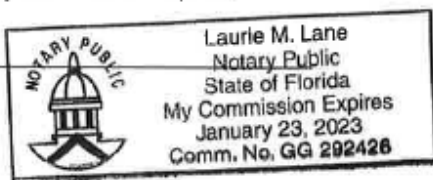
[Signature]  
Signature – Authorized Representative

6/17/19  
Date

Sworn to and subscribed before me on this 17th day of June, 2019

[Signature]  
Notary Public

My Commission Expires:



## STATEMENT OF INTENT

RFP/IFB NO. \_\_\_\_\_

A signed "Statement of Intent" shall be completed by both the proposer/bidder and the owner or authorized principal of each Local to provide services under this Solicitation.

\_\_\_\_\_ agrees to perform work on the above contract as (check one)  
 Name of Local Business ☐ a partnership; ☐ a corporation; ☐ an individual; ☐ a joint venture

**Local Business Contractor**

The Local Business will enter into a formal agreement, conditioned upon the Bidder/Proposer executing a contract with the City of North Miami for the work with \_\_\_\_\_.

Name of Bidder/Proposer

Item No.	Type of Work	Agreed Price of Work	Percentage of Work
1.		\$	%
2.		\$	%
3.		\$	%
TOTAL VALUE OF WORK		\$	%

Local Business Contact Name (Please Print)

Title

Date

Local Business Address, City, State &amp; Zip Code

Local Business E-Mail address

Phone Number

Authorized Local Business Signature

  
 Authorized Bidder/Proposer Signature

EXECUTIVE VICE PRESIDENT  
 Title

6/17/19  
 Date

**NOTE: A copy of the Local Vendor Business Tax Receipt and signatures of Local Business and Bidder/Proposer are required.**

Revised 06/03/16



**FORM "A-4"**

**QUESTIONNAIRE INSTRUCTIONS**

PROJECT: RFP 57-18-19

OWNER: CITY OF NORTH MIAMI

BIDDER: Brown & Brown of Florida Inc. dba T.R. Jones & Co.

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**INSTRUCTIONS**

- A. All questions are to be answered in full, without exception. If copies of other documents will answer the question completely, they may be attached and clearly labeled. If additional space is needed, additional pages may be attached and clearly labeled.
- B. The City of North Miami shall be entitled to contact each and every person/company listed in response to this questionnaire. The Bidder, by completing this questionnaire, expressly agrees that any information concerning the Bidder in possession of said entities may be made available to the City.
- C. Only complete and accurate information shall be provided by the Bidder. The Bidder hereby warrants that, to the best of its knowledge and belief, the responses contained herein are true, accurate, and complete. The Bidder also acknowledges that the City is relying on the truth and accuracy of the responses contained herein. If it is later discovered that any material information given in response to a questions was provided by the Bidder, knowing it was false, it shall constitute grounds for immediate disqualification, termination, or rescission by the City of any subsequent agreement between the City and the Bidder.
- D. If there are any questions concerning the completion of this form, the Bidder is encouraged to contact the Purchasing Department via email at [purchasing@northmiamifl.gov](mailto:purchasing@northmiamifl.gov) or via phone: (305) 895-9886.

**QUESTIONNAIRE**

Bidder's Name: Brown & Brown of Florida Inc. dba T.R. Jones & Co.

Principal Office Address: 1780 N. Krome Ave., Homestead, FL 33030





Official Representative: Norman L. Morris, Executive Vice President  
Individual  
Partnership (Circle One)  
Corporation

If a Corporation, answer this:

**When Incorporated: 04/03/1947**

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In what State: Florida

If Foreign Corporation:

**Date of Registration with**

Florida Secretary of State: 09/11/2014

Name of Resident Agent: C T Corporation System

Address of Resident Agent: 1200 South Pine Island Rd, Plantation, FL 33324

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President's Name: Michael Keeby

Vice President's Name: Fausto Alvarez

Treasurer's Name: Michael Sothen

Members of Board of Directors:

If a Partnership:

Date of Organization: \_\_\_\_\_

General or Limited Partnership\*: \_\_\_\_\_ Name and  
Address of Each Partner:

Name

Address

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

\*Designate general partners in Limited Partnership

1. Number of years of relevant experience in operating similar business: 72

2. Have any similar agreements held by Bidder for a similar project to the proposed project ever been canceled?

Yes ( )

No (X)

If yes, give details on a separate sheet.

3. Has the Bidder or any principals of the applicant organization failed to qualify as a responsible Bidder, refused to enter into a contract after an award has been made, failed to complete a contract during the past five (5) years, or been declared to be in default in any contract in the last five (5) years? NO

If yes, please explain:

4. Has the Bidder or any of its principals ever been declared bankrupt or reorganized under Chapter 11 or put into receivership? NO

If yes, give date, court jurisdiction, action taken, and any other explanation deemed necessary.

5. Person or persons interested in the proposal and Questionnaire Form \_A-4\_ (have)\_\_\_NOT\_\_\_(have not) been convicted by a Federal, State, County or Municipal Court of any violation of law, other than traffic violations. To include stockholders over ten percent (10%). (Strike out inappropriate words).

Explain any convictions on a separate sheet.

6. Lawsuits (any) pending or completed involving the corporation, partnership or individuals with more than ten percent (10%) interest:

A. List all pending lawsuits: Information regarding pending litigation is available in our public filings with the Securities and Exchange Commission.

B. List all judgments from lawsuits in the last five years: Refer to public filings with the Securities and Exchange Commission

C. List any criminal violations and/or convictions of the Bidder and/or any of its principals: None known

7. Conflicts of Interest. The following relationships are the only potential, actual or perceived conflicts of interest in connection with this proposal: (If none, so state).  
NONE

The Bidder understands that information contained in this Questionnaire will be relied upon by the City of North Miami in awarding the proposed Agreement and such information is warranted by the Bidder to be true. The undersigned Bidder agrees to furnish such additional information, prior to acceptance of any proposal relating to the qualifications of the Bidder, as may be required by the City Manager.

*The Bidder further understands that the information contained in this questionnaire may be confirmed through a background investigation conducted by the City of North Miami Police Department. By submitting this questionnaire, the Bidder agrees to cooperate with this investigation, including but not necessarily limited to fingerprinting and providing information for credit check.*

I certify that the information and responses provided on this Questionnaire are true, accurate and complete. The Owner of the Project or its representatives may contact any entity or reference listed in this Questionnaire. Each entity or reference may make any information concerning the Contractor available to the Owner.

Dated June 14, 2019

CONSULTANT:

Brown & Brown of Florida Inc

Norman L. Morris

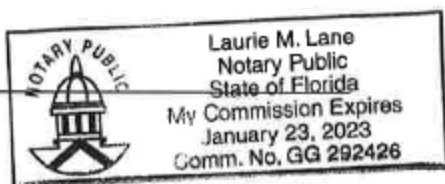
By Norman L. Morris  
Its Exec VP

Sworn to and subscribed before me this 14th day of June, 2019

Laurie M. Lane

Notary Public

My Commission Expires:



FORM A-5

ADDENDUM TO BID DOCUMENTS

BID NUMBER: 57-18-19 \_\_\_\_\_

BID OPENING DATE: 6/18/19 \_\_\_\_\_

To All Bidders:

It is the Bidder's responsibility to assure receipt of all addenda. The Bidder should verify with the designated Contracting Officer prior to submitting a proposal that all addenda have been received. Bidder's are required to acknowledge the number of addenda received as part of their proposals.

This form must be returned with your bid as acknowledgement of receipt of all addenda issued for this RFP, RFQ or IFB and must be signed in the space provided below. Bidder's failure to return this form will be deemed non-responsive and will not be considered for contract award.

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Please initial to acknowledge receipt of addenda pertaining to this contract:

Addendum No. 1	_____ <u>TKJ</u> _____
Addendum No. 2	_____
Addendum No. 3	_____
Addendum No. 4	_____
Addendum No. 5	_____
Addendum No. 6	_____
Addendum No. 7	_____
Addendum No. 8	_____
Addendum No. 9	_____
Addendum No. 10	_____

Acknowledged by:

Name: Thomas R. Jones Jr.

Signature:

Date: 6/14/19



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Form "A-6"

**BIDDER'S DISCLOSURE OF  
SUBCONTRACTORS AND SUPPLIERS**

RFQ, RFP OR IFB NO. 57-18-19

DISCIPLINE Broker Services

**Team Composition Plan**

Please provide the following for tracking purposes only:

Business Association	Business Name	Business Address	Business Phone #	Describe Type of Work to be Performed	% of Work	Diversity Class. *
Prime Contractor	Brown & Brown of Florida Inc. dba T.R. Jones & Co.	1780 N. Krome Ave., Homestead, FL 33030	305-246-7515	Broker Services-Insurance	100%	
Subcontractor						
Subcontractor						
Subcontractor						
Subcontractor						
Subcontractor						
Subcontractor						
Subcontractor						
Subcontractor						
Joint Venture						

**Diversity Classification:**

A = Asian American

B = African American

F = American Woman

H = Hispanic American

N = Native American

L=Local Vendor (North Miami)





## Form "A-7"

### General Insurance Requirements

Bidders must submit with their bid or proposal, proof of insurance meeting or exceeding the following requirements.

- Workers' Compensation Insurance – Statutory limits and Employer's Liability Insurance - \$1,000,000
- Fidelity / Dishonesty Coverage - \$500,000 per occurrence
- Professional Liability (Errors and Omissions) Insurance –
  1. \$1,000,000 per occurrence, \$2,000,000 aggregate on dedicated project limits with a deductible (if applicable) not to exceed \$25,000.00 per claim (audited financial statements required). The certificate of insurance shall reference any applicable deductible;
  2. Claims made policy must have an extended coverage reporting period of two years past the coverage completion date;
  3. For Deductible programs or Self Insured Retention Programs an Irrevocable Letter of Credit or performance Bond for amount of SIR/Deductible is required.
- Commercial General Liability Insurance – preferably written on an occurrence form with \$1,000,000 for each occurrence, to include contractual liability, personal & advertising injury, and products/completed operations.
- Automobile Liability Insurance – \$1,000,000 combined single limit bodily injury & property damage.

The successful Bidder(s) must submit, prior to signing of contract, a Certificate of Insurance including the City of North Miami as additional insured for Commercial General Liability and Auto Liability Insurance. Consultant shall guarantee all required insurance remain current and in effect throughout the term of contract.

**Please note:** The insurance requirements listed above are general in nature and should only be used as an indication of the most frequently required levels of coverage. Actual requirements may vary and will be fully documented within each individual IFB/RFP.



### REFERENCES (Form A-14)

List a minimum of three (3)

Name: City of Homestead Contact: Priscilla Thompson  
Address: 100 NE Civic Court  
City: Homestead State: FL Zip: 33030  
Contact Person: Priscilla Thompson, Risk Manager  
Phone: 305-224-4467 E-Mail: pthompson@cityofhomestead.com  
Type of Job Performed & Cost: Broker Services/Insurance Portfolio  
\$1,700,000 P&C annual premium

Name: City of Florida City Contact: Chad Burkhalter  
Address: P.O. Box 343570  
City: Florida City State: FL Zip: 33034-0570  
Contact Person: Chad Burkhalter, CFO  
Phone: 305-242-8109 E-Mail: flacityfd@floridacityfl.gov  
Type of Job Performed & Cost: Broker Services/Insurance Portfolio  
\$956,218 P&C annual premium

Name: The Redland Company Inc. Contact: Jon Hegler, CFO  
Address: 48 NE 15 Street  
City: Homestead State: FL Zip: 33030  
Contact Person: Jon Hegler, CFO  
Phone: 305-247-3226 E-Mail: JHegler@redlandcompany.com  
Type of Job Performed & Cost: Broker Services/Insurance Portfolio  
\$1,150,000 P&C annual premium



### REFERENCES (Form A-14)

List a minimum of three (3)

Name: City of North Miami Contact: Karen Muir  
Address: 776 Northeast 125th Street  
City: North Miami State: FL Zip: 33161  
Contact Person: Karen Muir, Risk Manager  
Phone: 305-893-6511 E-Mail: kmuir@northmiamifl.gov  
Type of Job Performed & Cost: Broker Services/Insurance Excess Workers  
Compensation - \$155,851 annual premium

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Name: Elm Spring, Inc. (etal) Contact: William "Bill" Urban  
Address: 600 Brickell Ave. Ste 2515  
City: Miami State: FL Zip: 33131  
Contact Person: Bill Urban  
Phone: 305-384-7104 E-Mail: burban@elmspringinc.com  
Type of Job Performed & Cost: Broker Services/Insurance Portfolio  
\$ 1,200,613 P&C annual premium

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Name: Key Largo Waste Water Distr Contact: Connie Fazzio  
Address: P.O. Box 491  
City: Key Largo State: FL Zip: 33037  
Contact Person: Connie Fazio, Sr. Finance Manager  
Phone: 305-451-4019 E-Mail: connie.fazio@klwtd.com  
Type of Job Performed & Cost: Broker Services/Insurance Portfolio  
\$195,225 P&C annual premium

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# Final Remarks

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Brown & Brown of Florida –was built upon a tradition of integrity, industry leadership and excellence. Founded in 1939 by two cousins, J. Adrian Brown and Charles Covington Owen, we are proud of our 70+ years of servicing the brokerage and consulting needs of our clients. We combine our years of experience with leading-edge products to provide exceptional service and value to our customers. We provide a full range of brokerage services including employee benefits, property and casualty, workers compensation, personal lines, including homeowners and auto insurance, financial and retirement products.

We are a publicly traded company on the NYSE, ticker symbol BRO. Our company is audited quarterly and our annual reports may be obtained through the SEC's EDGAR database or through our Tampa office without charge. We are the 6th largest independent insurance firm in the U.S. with over 290 offices in 43 states that include our headquarters in Daytona Beach, Florida. Brown & Brown is a decentralized organization that enables us to utilize our national leverage when needed without losing the feel of a local agency.

Our relationship with our clients continues to extend well beyond brokering insurance or providing consulting services; it is a partnership based on trust and common vision. Our job is not to be just your insurance brokerage and consulting firm, but your partner in achieving your property and casualty program objectives and business goals. We have a history of fulfilling our promises backed by a legacy of strength, stability and integrity.

We have all the resources of the large national consulting firms, but maintain our brokerage marketing and service niche. We have complete market access to all worldwide insurance markets. Concierge customer service for our clients and their employees.

Known for our analytical thinking and consultative approach, we deliver integrated insurance and risk management solutions to some of the most respected companies in the world. We do it in an entrepreneurial culture that respects creativity and individualized thinking. Our unique culture plays a vital role in attracting and retaining some of the best and most passionate insurance experts in the country. Having a team of professionals that love what they do has led to one of the highest client retention rates in the industry.

Collectively, we at Brown & Brown seeks to understand our clients ever changing needs and assert timely solutions with the greatest honor being our clients trust. Best-in-class customer service is always our goal, as service is and will remain a core benchmark to ensuring Brown & Brown's long term position and success as a world class insurance brokerage.

