

**BACKGROUND QUESTIONNAIRE
TO
REQUEST FOR QUALIFICATIONS AND PROPOSALS
FOR BROKER/VENDORS TO FURNISH
PROPERTY, VEHICLE, AND LIABILITY INSURANCE
FOR THE FISCAL YEAR BEGINNING JANUARY 1, 2025**

To the extent not otherwise provided in Proposer's submissions, please provide responses to the following:

- 1.* Provide a brief overview of Proposer's history and organization, including total number of employees, office location from which services to the Board will be provided, and organization of Proposer's client relationship-management personnel at such location. (Include the same information as to any subconsultants).
- 2.* Indicate the number of years of experience and expertise of Proposer's personnel to be assigned to perform each core service described in the subparagraphs of 3.0 in the RFQ/RFP. (Include the same information as to any subconsultants or venture partners).
- 3.* Describe any legal actions/arbitrations against you or your organization's insurance brokerage and underwriting activities in the past 5 years.
- 4.* Provide a description of the means, methods, tools and resources that Proposer would use in the analysis of potential alternatives, solutions, prospective health benefit programs and insurance carriers/vendors to meet the needs and objectives of the Binghamton-Johnson City Joint Sewage Board. (Include the same information as to any subconsultants).
- 5.* Generally describe the process/strategy Proposer uses for negotiations with insurance carriers.
- 6.* Describe those characteristics and factors the Proposer believes distinguish the Proposer from other consultants which may respond to this RFQ/RFP.
- 7.* Provide a summary listing of non-core or out-of-scope services not sought by this RFQ/RFP that Proposer presently furnishes to other clients.