

April 2, 2014

INVITATION TO QUALIFY

The purpose of this Invitation to Qualify (ITQ) is to establish a list of insurance brokers that are able to provide proposals and quotes to the Canadian Museum of Nature (CMN), the Canadian Museum of History (CMH), the Canada Science and Technology Museum (CSTMC), the Canadian Museum of Immigration at Pier 21 (CMP21) and the Canadian Museum for Human Rights (CMHR) collectively (the MUSEUMS) as described elsewhere in this document.

CLOSING DATE OF INVITATION TO QUALIFY

THURSDAY APRIL 24, 2014 @ 4 P.M.

<p>NAME AND ADDRESS OF ORGANIZATION</p> <hr/> <hr/> <hr/> <hr/>	<p>NAME AND TITLE OF PERSON AUTHORIZED TO SUBMIT AN EXPRESSION OF INTEREST ON BEHALF OF ORGANIZATION</p> <p>NAME: _____</p> <p>TITLE: _____</p> <p>Signature: _____</p> <p>Date: _____</p>
<p>Name</p> <hr/>	
<p>Telephone</p> <hr/>	<p>FILE N° 13-1630-CMN-114</p> <hr/>
<p>Please provide contact name and phone number for clarification &/or additional information.</p>	<p>Please return a signed copy of this form with your expression of interest.</p>

The CMN will act as the coordinator on behalf of the MUSEUMS and will seek insurance brokers who have an interest in providing the required insurance services to the MUSEUMS.

This is not a bid solicitation. This ITQ will not necessarily result in any contractual action and the service providers are not to earmark stock, facilities and/or resources relative to any requirements and/or opportunities described herein.

INSTRUCTIONS:

1. Deadline date for the submission of the ITQ including the Submittal Documentation:

4:00 P.M., THURSDAY APRIL 24, 2014

ITQ and Submittal Documentation received after this deadline will **NOT** be considered.

Deliver an electronic copy of your ITQ including the Submittal Documentation in an email marked - “Invitation to Qualify – ITQ # 13-1630-CMN-114”:

To: Approvisionnement-Procurement@mus-nature.ca

2. Each bidder must provide a copy of the front page of this ITQ signed by a representative who is authorized to act on behalf of the bidder.
3. This ITQ and any subsequent agreements related to the subject matter hereof will be governed according to the laws of the Province of Ontario.
4. This ITQ is **NOT** an offer to enter into an agreement with any party but rather a request to receive information from firms interested in providing the products and/or services outlined in the ITQ. Such information will be treated by the MUSEUMS as offers of interest. The

MUSEUMS reserve the right to reject all expressions of interest, in whole or in part, and/or to enter into negotiations with any party to provide such products and/or services to the MUSEUMS.

5. The MUSEUMS shall not be responsible, and will not reimburse any interested party, for any cost or expense incurred in the preparation, submission or presentation of a response to this ITQ.
6. Any questions from interested parties regarding the ITQ should be directed to and will be handled by:

Contracts & Procurement

Telephone: 613 566-4240

Facsimile: 613 364-4025

E-mail: Approvisionnement-Procurement@mus-nature.ca

7. All enquiries must be in writing to receive a response. A written response to any questions will be sent to all interested parties. Questions will not be accepted or responded to if received after **12:00 Noon, Wednesday April 16, 2014.**
8. The MUSEUMS reserve the right to verify all information provided by an interested party by means of direct contact with the interested party's clients, associates and personnel. The interested party must agree to provide and release necessary authorizations to verify any of the interested party's previous experience. Misstatements of experience and scope of prior experience may be grounds for disqualification of an interested party.
9. The MUSEUMS reserve the right to disqualify any interested party in the event that its response to the ITQ indicates that the manner in which the interested party provides services may adversely affect the MUSEUMS' existing business relationships.
10. At any time, the MUSEUMS may cancel this ITQ in whole or in part at no cost or penalty to the MUSEUMS. No reason for cancellation need be given.
11. With respect to the process, the MUSEUMS reserve the right to limit the number of interested parties and to reject any ITQ. The MUSEUMS

reserve the right to terminate or review the approved interested party status at any time.

12. The disclosure of information received relevant to the issue of this ITQ solicitations or the award of any contracts shall be made by the appropriate CMN officers in accordance with the provisions of the *Access to Information Act*, the *Privacy Act*, edicts/acts related to this subject issued by the Crown, and as amended.

Requirement:

To qualify, proponents must:

- a. Complete and return the Submittal documentation.**
- b. Be licenced to provide and place insurance in the provinces of Nova Scotia, Quebec, Ontario and Manitoba.
- c. Have local presence (affiliated broker partners accepted) in Nova Scotia, Quebec, Ontario and Manitoba.
- d. Be able to offer bilingual (English & French) customer service in the National Capital Region (NCR) and where/when necessary anywhere else required by the MUSEUMS.

Be able to provide insurance quotes to the MUSEUMS for:

- an insurance policy for Commercial General Liability Insurance (\$2 million) and an Umbrella Policy (\$8 million) that will equally cover the MUSEUMS with no aggregate limit or a per location aggregate for the participating MUSEUMS and an insurance policy for Directors and Officers Liability insurance for a minimum limit of \$5 million; with
 - A- Rated insurers licenced to do business in Canada.

Note:

- The Broker and Market must be able to provide higher limits as an option.
 - Not all of the MUSEUMS will require Directors and Officers Liability insurance.
- e. Offer third party special events insurance as required by the MUSEUMS' clients.
 - f. Must have the capability to place the following insurance requirements for one or more of the participating MUSEUMS:
 - Fine Arts Insurance

- Volunteer
 - Group Accident Insurance
 - Fleet Insurance
 - All Sport Insurance Marketing
 - Auto
 - Aviation General Liability
 - Non-Owned Aviation
 - Property
 - Boiler and Machine
 - Building and Equipment
- g. The proponent must demonstrate that their brokerage firm maintains Errors and Omissions Liability Insurance to a limit not less than \$10 million. Such insurance shall provide coverage for all errors and omissions made by the proponent, its partners, officers, directors and employees and shall be kept in for the term of an Agreement for five (5) years following the date of total completion for a contract. Provide a certificate of insurance demonstrating your compliance.

1. Requested Information:

- Name and address of the Broker along with contact information.
- Describe proven experience working with museums and Crown Corporations.
- Confirmation that the bilingualism requirement can be met.
- Confirmation that the services can be provided in the required Provinces and that the brokerage is licenced to place insurance in Nova Scotia, Quebec, Ontario and Manitoba.
- Confirmation that the broker has 2 or more insurance markets who can write liability coverage for the MUSEUMS and a list of insurers who the brokerage would like to partner with.
- Confirmation that the broker can provide all the insurance services and products required by the MUSEUMS.
- Confirmation that third parties will be able to procure special events insurance as required directly from the Broker.

- Identify which market the Broker would prefer to be assigned to/with for:
 - The Commercial General Liability Insurance and the Umbrella Policy; and
 - The Directors and Officers Liability insurance.
- Provide information indicating why the Broker should be considered as the most qualified.
- Provide references for various recent insurance placements similar to the MUSEUMS' requirements.

2. Procurement Milestones:

- Invitation to Qualify closing Thursday April 24, 2014.
- Qualified Brokers will be asked to respond to a closed Request(s) for Quotes (RFQ) as required by the MUSEUMS. The Qualified Brokers may be required to sign Non-Disclosure Agreement(s) prior to receiving the closed RFQ documents.

3. Other:

At the sole and absolute discretion of the MUSEUMS, the MUSEUMS reserve the right to assign a market to a Qualified Broker

4. Evaluation criteria:

Rating Factors	Weighting Percentage
Qualifications and experience of the brokerage firm and the assigned staff members. Experience of staff with the insurance requirements of organizations similar to the MUSEUMS in size and scope of operations and exposures.	30%
Existing successful insurance marketplace relationships which ensure beneficial access to both regular and specialty market insurance providers. Capability to place required coverages and capacity to provide reasoned alternatives where necessary.	25%
Provision of local services in Halifax, Winnipeg and the National Capital Region:	20%

<ul style="list-style-type: none"> – size and capabilities of the local offices. – provision and quality of local renewal process services. – provision and quality of local claims management services. 	
<p>References</p> <ul style="list-style-type: none"> – minimum of three (3) references – at least one (1) reference from Halifax – at least one (1) reference from Winnipeg – a reference for Aviation Liability insurance – a reference for third party special event insurance – references may be used by the evaluation committee for the other Rating Factors above. 	25%