



ONLINE MEMBER PORTAL

REQUEST FOR PROPOSAL

March 2025



AGFG
AMERICAN GUARANTY FUND GROUP

SOLICITATION COVER SHEET

ISSUE DATE: 3/11/2025
 PROJECT: AGFG Request for Proposal for AGFG Online Member Portal
 SUBMITTAL DEADLINE: **4/11/2025 by 5:00 pm EST**
 DELIVER PROPOSALS TO: AGFG Request for Proposal for AGFG Online Member Portal

Regular Mail	Express Mail	Email
P.O. Box 15159 Tallahassee, Florida 32317	1400 Village Square Blvd Suite 3-008 Tallahassee, Florida 32312	cball@agfgroup.org

*Proposal delivery to any other location will not be considered**

SECTION FOR VENDOR USE: RETURN COMPLETED COVER PAGE WITH PROPOSAL

PROJECT: _____

DATE OF PROPOSAL: _____

BUSINESS NAME: _____

MAILING ADDRESS: _____

PHYSICAL ADDRESS: _____

TELEPHONE NUMBER: _____ FAX: _____

CONTACT NAME: _____

CONTACT EMAIL: _____

BY: _____ TITLE _____

(Signature)

THIS IS NOT AN ORDER. THE ATTACHED TERMS AND CONDITIONS SHALL BECOME PART OF ANY CONTRACT RESULTING FROM THIS INVITATION TO NEGOTIATE. PROPOSALS SHALL BE SUBMITTED IN THE INDICATED FORMAT; ORIGINAL SIGNATURES MUST BE SUBMITTED ON THE FORM PROVIDED.

CONTENTS

<u>GENERAL INFORMATION</u>	<u>2</u>
<u>SCOPE OF SERVICES</u>	<u>2</u>
Statement of Purpose	2
General Requirements	3
Term of Contract	3
<u>INSTRUCTIONS FOR RESPONDENTS</u>	<u>4</u>
Contact Information	4
Calendar of Events	4
Questions, Objections or Comments	4
Disclaimer	5
Quantity & Delivery	5
Improper Delivery	5
Lobbying	5
<u>PROPOSAL FORMAT</u>	<u>6</u>
Submissions	6
Submission Format	6
<u>PROPOSAL CONTENT</u>	<u>7</u>
Tab 1: Solicitation Cover Sheet & Conflict of Interest Disclosure Form (Exhibit A)	7
Tab 2: Firm Identification & Corporate Background	7
Tab 3: Company Profile	7
Tab 4: Scope of Services	8
Tab 5: References	10
Tab 6: Cost of Services	10
<u>SELECTION PROCESS</u>	<u>10</u>
<u>RIGHT TO REJECT & NOT REWARD</u>	<u>11</u>
<u>CONFLICT OF INTEREST FORM</u>	<u>12</u>
<u>PRICE SHEET SUMMARY</u>	<u>13</u>
<u>CLIENT REFERENCE FORM</u>	<u>14</u>
Client 1	15
Client 2	16
Client 3	17

GENERAL INFORMATION

American Guaranty Fund Group (AGFG) is a service company created to provide management and administrative services related to all post-insolvency claims filed with Florida Insurance Guaranty Association (FIGA), and the Florida Workers' Compensation Guaranty Association (FWCIGA), general management responsibilities for operations of the Tallahassee office and maintaining staff necessary to carry out day-to-day operations. FIGA and FWCIGA are responsible for providing AGFG with policy and direction from the appropriate Board of Directors. AGFG employees manage the procurement process on behalf of FIGA and FWCIGA.

The Florida Insurance Guaranty Association (FIGA) is a nonprofit corporation created by the Florida Legislature in 1970. All duties are performed on FIGA's behalf through a management agreement with the American Guaranty Fund Group (AGFG), and this solicitation will be managed by AGFG employees. FIGA is governed by Part II of Chapter 631, Florida Statutes, a Plan of Operation established by its Board of Directors. FIGA provides the payment of covered claims for insurance companies that are declared insolvent and unable to continue making payments to claimants and policyholders. All property and casualty insurance companies licensed in Florida are members of FIGA as a condition of their authority to offer property and casualty insurance in the state of Florida.

The Florida Worker's Compensation Insurance Guaranty Association (FWCIGA) is almost identical to FIGA other than the line of coverage they guaranty. The purpose of the Florida Workers' Compensation Insurance Guaranty Association, Inc. (FWCIGA) is to implement Florida Statute Sections 631.901 – 631.932 and to provide a mechanism for the payment of covered claims, to avoid excessive delay in payment and to avoid financial loss to claimants in the event of the insolvency of a member insurer. FWCIGA was created through a merger of the Florida Self-Insurance Fund Guaranty Association, Inc. (FSIFGA) and the workers' compensation account of the Florida Insurance Guaranty Association, Inc. (FIGA), as required and provided for by legislation enacted by the legislature of the State of Florida (Florida Statute Section 631.911).

SCOPE OF SERVICES

Statement of Purpose

AGFG is seeking proposals from qualified firms to develop an online platform to enhance the exchange of information and business transactions with members of FIGA and FWCIGA. Currently, AGFG applies a heterogeneous, decentralized combination of modalities and workflows to support members. AGFG believes that providing a one-stop location via a modern web site – a "Member Portal" – will make doing business with FIGA and FWCIGA more efficient, manageable, and convenient. The selection of a successful respondent and the execution of an agreement will be accomplished in accordance with Part II and Part V of Chapter 631, Florida Statutes, and the entities' Plan of Operations.

General Requirements

AGFG envisions having a Member Portal web site (hosted by the vendor) that FIGA and FWCIGA members will use to conduct business with FIGA/FWCIGA. The Member Portal will enable users to manage member information, receive, manage, and pay assessments, engage in annual reconciliations, respond to data calls, participate in board elections, and receive and request support.

In addition to member-oriented features, the site will also have internal-facing features that allow FIGA/FWCIGA staff to configure, interact with, and manage the functions available to members. This includes managing Member Portal users, viewing and updating member information, administering assessments and annual reconciliations, conducting data calls, and facilitating board elections.

The Member Portal will be integrated with key FIGA/FWCIGA systems such as the Membership application and the Deposit Tracking system, so that data is shared with these systems. While being open to various approaches and not requiring a specific set of technologies per se, AGFG is currently using and prefers Microsoft SQL Server and VB.NET applications as its core tools. As noted above, it is important to AGFG that the Member Portal be integrated with AGFG's tools (and flexible enough to efficiently handle future integrations and updates). Post-deployment factors are also important to AGFG, including ongoing support and maintenance performance and costs.

Term of Contract

Initial Term:

The term of the contract resulting from this Request for Proposal (RFP) shall be as follows:

- 1. One-Time Development Project:** The initial term will cover the one-time development of the AGFG Online Member Portal, with services rendered in 2025. All expected deliverables will be due within 90 days of the contract being signed.
- 2. Optional Multi-Year Hosting:** AGFG may opt into a multi-year hosting and support arrangement following the completion of the development project. This optional service will cover ongoing system hosting, maintenance, and support to ensure optimal performance and stability.

Renewal Options:

Although this is a one-time contract, AGFG reserves the rights to renew the contract on an annual basis for any future work, if needed.

Amendments:

Changes to the contract term may be made only with the mutual written consent of both parties.

INSTRUCTIONS FOR RESPONDENTS

Contact Information

Questions related to the solicitation and submission of proposals should be addressed to:

AGFG Member Portal
 Attn. Cavondra Ball
 American Guaranty Fund Group
 P.O. Box 15159
 Tallahassee, FL 32317
 (850) 523-1832
 cball@agfgroup.org

Calendar of Events

The important actions and dates/times by which the actions must be taken or completed are listed below. All listed times are local time in Tallahassee, Florida. Any change or modification to this calendar, modifications to this solicitation document, or other important notices will be disseminated to all prospective respondents.

ACTION	DATE/TIME
Release of Solicitation document	3/11/2025
Submission of written questions	3/21/2025 – 4:00 pm EST
Response to written questions	3/28/2025
Proposals due/opening	4/11/2025 – 4:00 pm EST
Proposal review completed	5/9/2025
Selection / Awards	5/30/2025
Submission of Deliverables (if applicable)	90 days after contract award signing

Questions, Objections or Comments

Respondents are required to carefully review this solicitation document without delay for any questions, objections, or comments. Questions, objections, or comments must be made in writing and received no later than the date and time reflected in the Calendar of Events above so that any necessary amendments may be published and distributed to potential respondents. However, in its sole discretion, AGFG reserves the exclusive right to answer any questions received after the deadline. AGFG shall answer questions in accordance with the

Calendar of Events. All questions submitted shall be published and answered in a manner that all respondents will be able to view, such as on AGFG's website. Respondents shall not contact any other employee of AGFG for information with respect to this solicitation, other than the individual identified in "Contact Information" above.

Disclaimer

AGFG assumes no responsibility for any interpretation or representations made by its officers, agents, or employees unless interpretations or representations are incorporated in a written amendment to the solicitation document as outlined in the Questions, Objectives or Comments section.

Quantity & Delivery

A single hard copy or electronic copy of the proposal must be received at the contact address above on or before the deadline. Electronic submissions are preferred and must be delivered as a single document in PDF format. No hardcopy submission is required if remitting electronically. Hard copy submissions must also include an electronic copy in a single document PDF format via thumb drive, CD or email. Proposals will be date-stamped whether received via hard copy or email, and will not be opened until the due/opening date prescribed in the Calendar of Events [page 4]. Proposals received in whole or in part after 4:00 pm on 4/11/2025 will not be considered.

Improper Delivery

Neither the AGFG nor its officers, agents, or employees shall be responsible for any proposal not properly addressed and identified.

Lobbying

The selection process shall not be compromised or distorted by private lobbying outside of the procedures designated to award the best proposals for AGFG. Respondents to this solicitation or persons acting on their behalf may not contact, between the release of the solicitation and the 72-hour period following the selection, excluding Saturdays, Sundays, and holidays, any employee, officer, or general counsel of AGFG and its Board of Directors and the respective members of the Board of Directors for either FIGA or FWCIGA, concerning any aspect of this solicitation, except in writing to the individual identified in the "Contact Information" section provided in the solicitation documents. Violation of this provision may be grounds for rejecting a response.

A list of all Board of Directors, General Counsel, and AGFG employees is available on request.

After the proposals are opened, AGFG in its sole discretion shall determine which proposals are deemed responsive and responsible, and forward those proposals for evaluation to the AGFG staff who are reviewing the proposals. AGFG staff will review the proposals and recommend a vendor. Any person/entity whose proposal is selected for further evaluation

shall confine all contacts with AGFG representatives to responses to questions or interviews by AGFG staff.

PROPOSAL FORMAT

Submissions

This section prescribes the format in which the proposals are to be submitted. Additional information deemed appropriate by the respondent may be included but must be placed within the relevant section. Additional tabs beyond those designated in this section will not be evaluated. The following paragraphs contain instructions describing the required format for proposals, including limitations on the number of pages for select Tabs.

Proposals shall be limited to a page size of eight and one-half by eleven inches (8.5" x 11"). All proposals must contain the sections outlined below. Those sections are called "Tabs." A "Tab as used here, is a section separator, offset, and labeled (Example: "Tab 1, AGFG Online Member Portal Cover Sheet and Conflict of Interest Disclosure Form"), such that the evaluators can easily turn to "Tabbed" sections during the evaluation process.

AGFG is under no obligation to look for responsive information contained in incorrectly tabbed sections. Respondents should specifically reference the tabbed section and corresponding page number(s) in which responsive information and documentation can be found if responsive information is also contained in other sections. Respondents are cautioned to carefully proofread Proposals to ensure the removal of boilerplate disclaimers which have the effect of negating commitments made elsewhere in the Proposal. The following are the six tabbed sections that must be in all Proposals.

- Tab 1 – Solicitation Cover Sheet & Conflict of Interest Disclosure Form [Exhibit A]
- Tab 2 – Firm Identification and Corporate Background
- Tab 3 – Company Profile
- Tab 4 – Scope of Services
- Tab 5 – Client References [Exhibit C]
- Tab 6 – Cost of Services [Exhibit B]

Proposals that fail to submit all required information will be deemed nonresponsive. Proposals shall be concise and account whether the Respondent's proposed solution can meet the requirements of this RFP. The emphasis of each Proposal shall be on completeness and clarity.

Submission Format

Proposals must be received no later than the date and time indicated in Calendar of Events section [page 4] and should adhere to the following:

- Written Responses should be submitted bound and typed in font no smaller than Arial 11 pt. Number all pages, and organize the Proposal into labeled and tabbed sections in the order listed above under the Submissions section. Five (5) copies should be provided for the evaluation team.

- Proposals should not exceed thirty [30] pages.
- Digital responses must be submitted following the above requirements to the contact listed in the Contact Information section [page 4] via the Respondent's choice of file sharing or physical media delivery. It is recommended that Respondent mails a flash drive with a copy of the Proposal in addition to their digital submission.

PROPOSAL CONTENT

The following items are to be provided by all respondents:

Tab 1: Solicitation Cover Sheet & Conflict of Interest Disclosure Form (Exhibit A)

Complete and sign the Cover Sheet and Conflict of Interest Disclosure form and include it under Tab 1.

AGFG will not enter into an agreement with a respondent who has clients who may present a potential conflict of interest with AGFG unless the General Counsel advises that the conflict may be waived. In such case, AGFG will require the successful respondent to obtain an express waiver of conflict from said other respondent client.

Tab 2: Firm Identification & Corporate Background

Please provide the following (5 page maximum):

1. Full name, address, and phone number of your organization.
2. Date established.
3. The legal structure of your firm, i.e., whether you operate as an individual partnership or corporation, and provide a list of all affiliated entities.
4. A brief history of your entity.
5. An approximate number of employees with your firm.

Tab 3: Company Profile

Provide the information requested below that best describes the respondent's company profile (10 page maximum):

A company overview is to include the following points:

1. Provide a detailed outline of your firm's experience in developing and hosting online platforms that provide the features and functionalities prescribed in the General Requirements section
2. Summarize the experience and tenure of your firm, and provide a brief biography of all personnel who would be working on the project and any other key individuals who would participate, including licenses and/or certificates. Vendor is responsible for all licensing matters.

3. Please describe your firm's approach to resolution of technical disagreements (a) among engagement personnel, and (b) between the firm and the client, which could arise.
4. Provide supporting elements such as existing portfolio(s) of previous work, platform mockups, and associated costs.
5. Provide options for in-person demonstrations of similar work and negotiations

Tab 4: Scope of Services

Provide an overview of the Member Portal's purpose, such as facilitating communication and required submissions, data access, review and updates, and regulatory compliance for Guaranty Association members. Highlight the goals for user experience, security, and system performance (10 page maximum).

1. Member Portal Features and Functionality

1.1 User Management

- User registration, login, and role-based access control
- User profile management
- Password recovery and multi-factor authentication

1.2 Member Account Management

- Membership information display and editing
- Reporting history
- Automated reminders/notifications

1.3 Document Management

- Secure file sharing
- Document repository
- Version control and access logs

1.4 Reporting & Analytics

- Pre-configured and custom reports on reporting and membership
- Required reporting distribution and collection
- Data visualization (e.g., charts, dashboards)
- Export options (CSV, PDF)

1.5 Member Communications

- Internal messaging system
- Announcement and news feed feature
- Email notifications

1.6 Compliance

- Secure submission of required reports
- Automated reminders for deadlines
- Audit trails and data logging

1.7 Self-Service Support

- Knowledge base and FAQ
- Support system for questions not and issues

2. Technical Requirements

2.1 Platform Compatibility

- Responsive design for desktop, tablet, and mobile
- Cross-browser compatibility

2.2 Security & Compliance

- Role-based access control and permissions
- SSL encryption for data in transit
- Data encryption at rest
- Compliance with relevant regulations (e.g., HIPAA, GDPR)

2.3 Data Integration & Interoperability

- API support for external system integration
- Data import/export functionality

2.4 Performance and Scalability

- Minimum load times for pages and reports
- Scalable architecture to handle increased member usage

2.5 Disaster Recovery and Backup

- Regular data backups
- Redundancy and disaster recovery plans

3. Development & Implementation Plan

3.1 Project Phases

- Requirements gathering
- Design and development
- Testing and quality assurance
- Deployment and user training

3.2 Timeline

- Estimated delivery dates for each phase

3.3 Acceptance Criteria

- Criteria for successful completion of each phase

4. Maintenance & Support

- Regular updates and enhancements
- Bug fixes and security patching
- Technical support

5. Training & Documentation

- User manuals and training videos
- Admin training sessions

6. Roles & Responsibilities

- Responsibilities for the service provider
- Responsibilities for AGFG

7. Pricing & Payment Terms

- Pricing breakdown by phase or service
- Payment schedule and terms

Tab 5: References

Respondents must complete and include **Exhibit C: Client Reference Form** as part of the proposal submission. References from at least 3 clients where similar web-based platforms were developed within the last three (3) years are preferred.

Tab 6: Cost of Services

Respondents must complete and include **Exhibit B: Price Sheet Summary** as part of the proposal submission. While cost is a key consideration, it will not be the sole factor in selecting the successful respondent.

SELECTION PROCESS

AGFG will conduct a comprehensive, fair, and impartial review and evaluation of all proposals meeting the requirements of this proposal using the selection criteria below. The evaluation committee will review the proposals and recommend a vendor(s). Contract negotiations will begin with the most qualified and suitable firm of demonstrated competence for professional services to determine whether an agreement can be reached. AGFG may negotiate with the next most qualified and suitable firm(s) if agreements cannot be reached. AGFG anticipates one contract being awarded. The final contract will be submitted to the Executive Director for signature and subject to AGFG Board of Directors approval.

For the purpose of evaluation, scoring, and ranking, proposals have been divided into seven categories. The following reflects the maximum number of points that may be awarded by category:

Tab #	Title	Score Type
Tab 1	Cover Sheet and Conflict of Interests	Pass / Fail
Tab 2	Firm ID and Corporate Background	Up to 10 points
Tab 3	Company Profile	Up to 20 points
Tab 4	Scope of Services	Up to 40 points
Tab 5	Client References	Up to 5 points
Tab 6	Cost of Services	Up to 25 points
	Total Points	100 points max.

Based on the results of the above, AGFG will invite one or more Respondents to demonstrate similar systems they've created in-person and negotiate a final contract.

RIGHT TO REJECT & NOT REWARD

AGFG may accept or reject any and all proposals or waive irregularities, and reserves the right not to award contracts when it is in the best interest of the AGFG to do so.

EXHIBIT "A"

CONFLICT OF INTEREST FORM

American Guaranty Fund Group, Florida Insurance Guaranty Association, and Florida Workers' Compensation Insurance Guaranty Association

Vendor Conflict of Interest Disclosure Form

All Vendors should be aware that the entities listed above have a Conflict of Interest and Ethics Policy which prohibits employees and Board members from having certain relationships with persons or entities conducting (or proposing to conduct) business with any of the entities and which prohibits the acceptance of gifts from Vendors. If a vendor has a disclosable relationship the Vendor should disclose any Conflict of Interest or potential Conflict of Interest that may exist. A disclosable relationship would include:

- Knowingly employing an employee, board member or family member of any entity listed above
- Knowingly allowing an employee, board member or family member to own or have a material personal financial interest (directly or indirectly) in the Vendor of any entity listed above
- Knowingly engaging in a material personal business transaction with an employee, board member or family member of any entity listed above.

I hereby certify that the Vendor referenced below does not have a potential conflict of interest with an employee, board member or family member of any of the entities listed above:

_____ Name

Or

I hereby certify that the Vendor referenced below DOES have a potential conflict of interest with an employee, board member or family member of any of the entities listed above:

_____ Name

If there is a potential conflict of interest, please provide the following information:

List the name(s) of the employee or board member with whom there may be a conflict of interest:

Briefly describe the nature of the potential conflict of interest: _____

VENDOR Name: _____

FEIN: _____ Phone Number: _____

Address: _____

EXHIBIT "B"
 PRICE SHEET SUMMARY

Respondent Name:	
Signature of Authorized Representative:	
Date:	

In the table below indicate the estimated number of hours and fixed, all-inclusive price per deliverable. The Respondent must include all pre-requisite costs necessary to complete the deliverable in the price. Upon AGFG's acceptance of a deliverable being completed, the Respondent may invoice for the deliverable.

AGFG reserves the right to split or merge Deliverables as needed to effectively manage the project. The overall project fees will not be impacted by this.

Prices provided must be fully inclusive of all costs. No travel or incidental costs will be paid. Any software licensing and maintenance fees are assumed to be included in the implementation costs until the system is live and fully accepted by AGFG.

Price Sheet Summary: One-time Member Portal Development & Deployment			
Item Description	Estimated Hours	Rate Per Hour	Total Cost
Online Portal Development		\$	\$
System Integration with AGFG Applications		\$	\$
Deployment		\$	\$
Total Development Cost (Not to Exceed)		\$	\$

Price Sheet Summary: Optional Multi-year Hosting & Support			
Item Description	Hosting Fee	Additional Fees	Total Cost
Annual Operational Costs	\$	\$	\$

EXHIBIT "C"

CLIENT REFERENCE FORM

RESPONDENT NAME:

On the following pages, the Respondent shall provide the information indicated for three separate and verifiable client references. The client references must be for work similar in nature to that specified in this solicitation. In the event the respondent has had a name change since the time work was performed for a listed reference, the name under which the Respondent operated at that time must be provided in the space provided for Respondent's Name (if different from above).

Entities having an affiliation with the Respondent (i.e., currently parent, subsidiary having common ownership, having common directors, officers or agents or sharing profits or liabilities) may not be accepted as client references under this solicitation.

Client contacts should be available for telephone contact during normal business hours, 9:00 AM through 5:00 PM, Eastern Time. AGFG will attempt to reach each client contact by telephone four times. In the event the client contact indicated cannot be reached following four attempts, the Respondent will receive a score of zero for that reference.

AGFG reserves the right to contact sources other than the client references identified by the respondent to obtain additional information regarding the Respondent's past performance. Information obtained from other contacted sources may be used to determine the quality of work done and overall satisfaction with the Respondent.

EXHIBIT "C"

CLIENT REFERENCE FORM

CLIENT 1	
Respondent's Name:	
Client's Name:	
Address:	
Primary Contact Person:	
Primary Email Address:	
Primary Phone Number:	
Alternate Contact Person:	
Alternate Phone Number:	
Alternate Email Address:	
Dates of Contract between Respondent & Client:	

Please give a brief description of the services performed by the Respondent for the above named client below:

EXHIBIT "C"

CLIENT REFERENCE FORM

CLIENT 2	
Respondent's Name:	
Client's Name:	
Address:	
Primary Contact Person:	
Primary Email Address:	
Primary Phone Number:	
Alternate Contact Person:	
Alternate Phone Number:	
Alternate Email Address:	
Dates of Contract between Respondent & Client:	

Please give a brief description of the services performed by the Respondent for the above named client below:

EXHIBIT "C"

CLIENT REFERENCE FORM

CLIENT 3	
Respondent's Name:	
Client's Name:	
Address:	
Primary Contact Person:	
Primary Email Address:	
Primary Phone Number:	
Alternate Contact Person:	
Alternate Phone Number:	
Alternate Email Address:	
Dates of Contract between Respondent & Client:	

Please give a brief description of the services performed by the Respondent for the above named client below: