



Request for Qualifications for Insurance Brokers

Released: September 4, 2025

Released by Philadelphia Energy Authority & Philadelphia Green Capital Corp.

Responses Due: October 3, 2025 at 5:00 p.m.

Purpose

The purpose of this Request for Qualifications (“RFQ”) is to solicit qualifications from insurance brokers qualified and licensed to provide the Philadelphia Energy Authority (“PEA”) and the Philadelphia Green Capital Corp (“PGCC”), together referred to as the “Organizations”, with professional brokerage and risk management services. RFQ responses will be used to select a firm to assist the Organizations in securing and managing comprehensive insurance coverage that meets contractual requirements and appropriately covers risks associated with business activities.

Minority-, Women-, and Disabled Service member-Owned Business Enterprises (M/W/DSBEs) are encouraged to submit their qualifications. All qualified applicants will receive consideration without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.

All questions, communication and responses to this RFQ must be emailed to Broker.RFQ@philaenergy.org or submitted via the provided online portals.

Organization Overviews

Philadelphia Energy Authority (“PEA”)

PEA is a quasi-governmental, independent municipal authority that supports the clean and renewable energy industry in Philadelphia. PEA partners with the City of Philadelphia on programs and projects, and administers its own programs to help Philadelphia residents and businesses access clean and renewable energy. PEA does not construct or own any energy assets.

- Founded in 2011; 14 years in operation
- Number of employees: 23
- Estimated FY26 (June 2025-26) Revenue: \$10.9M
- FY25 (June 2024-25) Revenue: \$14.3M

Philadelphia Green Capital Corp (“PGCC”)

PGCC is a Pennsylvania nonprofit corporation with 501(c)3 status. PGCC supports the work of PEA primarily through the management of grants and other funds. PGCC aims to make and facilitate investments in clean and renewable energy projects in southeast Pennsylvania.

- Founded in 2021; 4 years in operation
- Number of employees: 6
- Total Balance Sheet Assets as of June 30, 2025: \$15.9M
- Total Balance Sheet Liabilities as of June 30, 2025: \$10.7M

Scope of Services

The selected firm shall provide, at minimum, the following services:

- Negotiate competitive terms and secure insurance coverage, which may include, among others:
 - General liability
 - Professional liability
 - Directors and officers/public officials' liability
 - Workers compensation
 - Disability and life insurance
 - Crime and fidelity
 - Auto insurance for non-owned and hired automobiles
 - Umbrella/excess general liability
- Review the Organization's current business operations and contracts to assess operational risks and contractual requirements, and provide recommendations regarding appropriate, necessary, and cost-effective insurance policies and deductibles.
- Represent the Organizations in all dealings with insurance underwriters and claims staff.
- Review new contracts for compliance with current insurance coverage.
- Track and notify the organization of premium invoices in a timely manner and maintain active insurance coverage without any lapses.
- Meet with the Organizations individually at least once a year, or as requested, to review existing insurance policies, assess the adequacy of coverage and limits, determine appropriate deductible levels, identify any overlaps or gaps in coverage, and inform the Organizations of any industry or market developments that may impact the Organizations or their insurance coverage.

Evaluation Criteria

- Authorized and licensed to provide insurance brokerage services in Pennsylvania, and in good standing with any other regulatory authorities.
- Experience working with any of the following:
 - local government and quasi-governmental organizations
 - non-profits
 - financial institutions
 - energy and sustainability companies
 - other relevant clients of similar size or complexity
- Value & Price
 - Approach to soliciting policy quotes and ensuring that multiple quotes are provided when possible.
 - Total fees associated with service including brokerage fees, commission and any additional fees.
- Quality of Client Experience
 - Availability of dedicated personnel for account management, support and backup.
 - Approach to working with clients, including experience in risk assessment for small organizations and claims management.

- Demonstrated commitment to understand the Organization's unique business structures and needs, and serve as a trusted and expert advisor.
- Process for issuing invoices and providing policy booklets in a timely manner.
- Availability of online portals for accessing policy documents and making invoice payments.
- Approach to notifying clients of cancellations and changes in policy.
- Strength and relevance of business references.
- Terms and conditions of brokerage services and compensation structure.
- Commitment to creating economic benefit and opportunity for Philadelphia.

Submission Requirements

- Firm Overview: name, address, M/W/DSBEs status, and company history.
- Experience and Qualifications: relevant experience, key personnel bios, and a list of similar clients.
- Approach and Methodology: description of the firm's approach to risk management and brokerage services.
- Fee Structure: detailed description of brokerage fees, commission structure and any additional fees. Please include fee or commission percentages as applicable.
- Client Experience: description of key client-facing personnel and respective roles; approach to working with clients and understanding their business structures and needs; processes and systems for providing policy documents and making invoices payments; and notification procedures for policy cancellations and changes.
- Regulatory Compliance: proof of licensing and regulatory compliance.
- Terms of Engagement: sample terms and conditions for brokerage services.
- Local Impact: Description of how your firm creates economic benefit and/or opportunity for Philadelphia.
- References: Contact information for at least three (3) clients with similar insurance needs.
- Any additional service offerings and pricing.

Respondents must submit an electronic version of their Qualification through the [RFQ submission form](#) no later than 5pm on Friday, October 3, 2025 at 5:00 p.m. Responses received after the deadline will not be considered.

Schedule

The following is the schedule for this Insurance Broker RFQ public procurement:

Activity	Due/Time
Request for Qualifications Issued	September 4, 2025
Deadlines to submit inquiries related to the RFQ	September 17, 2025 @ 5:00 p.m.
Responses to RFQ inquiries posted	September 26, 2025
Deadline to submit Qualifications via this form.	October 3, 2025 @ 5:00 p.m.
Respondent interviews	October 13 -17, 2025
Projected date for Selection	October 24, 2025

Questions About this RFQ

Written questions regarding this Request for Qualifications for Insurance Brokers will be accepted on an ongoing basis. All questions must be [submitted online](#) no later than September 17, 2025 at 5:00 p.m.

Responses to questions of substance will be posted to:

https://philaenergy.org/public_bids/pea-pgcc-rfq-insurance-brokers/ by September 26, 2025.

Communications and Prohibited Contacts

All communications with the Organizations regarding the RFQ or any other aspect of the procurement process shall be in writing. All communication shall be exclusively directed to Broker.RFQ@philaenergy.org, unless otherwise directed in writing by the Organizations. Other than with the written consent of the Organizations, any person that is employed by or is otherwise associated or affiliated with a Respondent, or any of their affiliated companies, is prohibited from contacting any employee or official of the Organizations or any attorney or consultant of the Organizations, on any matter having to do with this procurement.

No oral communication or statement by any representative of the Organizations may in any way modify this RFQ or any other aspect of the procurement process. This includes communications and statements that may be made over the telephone or during pre-submittal conferences, interviews, or other meetings attended by PEA or PGCC. This RFQ or other aspect of the procurement process may be modified only through the issuance by the Organizations of a written addendum.

All questions regarding this RFQ may be shared by the Organizations with all firms receiving this RFQ.

Public Disclosure and Confidential Information

All Responses and other information submitted in response to this RFQ are subject to the public disclosure requirements of applicable law, including the Pennsylvania Right to Know Act (65 P.S. § 67.101 et seq.). To the extent permitted by applicable law, the Organizations will use their best efforts to keep from public access the specific information that is identified by the Respondent as confidential. If a Respondent claims an exception to public disclosure requirements and desires that the Organizations keep certain information from public disclosure, then the Respondent must mark the Response as “Confidential”. If the Organizations receive a public disclosure request associated with this RFQ, Respondents will be given the opportunity to redact specific portions of their Response that have a legal basis to be deemed confidential.

Notwithstanding any such notice, however, the Organizations may disclose such marked information to individuals participating in the review or evaluation of Responses, including members of the Evaluation Committee, other PEA and PGCC employees, and advisors, attorneys, and consultants.

Organizations’ Rights

The Organizations reserve the right to modify this selection process, which may be exercised in its sole discretion at any time during the procurement process:

- a) to cancel this RFQ or the procurement process, with or without the substitution of another pre-qualification or procurement process;
- b) to waive any informality, defect, non-responsiveness, or deviation in a Response, a proposal, or other submission, that is not material;
- c) to require one or more Respondents to supplement or clarify its Response or to provide additional information after the submission of Responses;
- d) to take any action affecting the RFQ or the procurement process that would be in the best interests of the Organizations;
- e) to conduct investigations and make inquiries concerning any aspect of any Response;
- f) to reject any or all Responses;
- g) to reject a Respondent or firm that has been delinquent or unfaithful in the performance of any contract with or obligation to the Organizations, is financially or technically incapable, or is otherwise not responsible;
- h) to supplement or amend this RFQ; and/or
- i) to make judgments about the contents of any Response with respect to the requirements and criteria set forth in this RFQ.

Legal Terms and Conditions

Responsibility.

All Respondents shall assume all responsibility and obligation for the acts and omissions of its principals, members, directors, officers, employees, agents, representatives, subcontractors, and consultants, together with all other firms, agencies, or other persons assisting with delivery

of the response.

Governing Law.

The terms and provisions of this RFQ and any agreements related hereto shall be construed in accordance with the laws of the Commonwealth of Pennsylvania, and any and all litigation, proceedings, claims or actions commenced in connection with this RFQ or any agreements related hereto shall be instituted in the appropriate courts in the Commonwealth of Pennsylvania.

Assignment.

The successful Respondent may not sell, assign, transfer, or convey any rights or agreements associated with its Response, in whole or in part, without the prior written consent from the Organizations.

Promotion.

Unless specifically authorized in writing by PEA and PGCC, respondents will have no right to use, and shall not use PEA or PGCC's names (a) in any advertising, publicity, promotion; nor (b) to express or to imply an endorsement of respondents' products or services.

Costs.

Any and all costs incurred by any Respondent, or other party in connection with this RFQ or other aspect of the procurement process shall be at such party's expense and risk. Neither PEA nor PGCC accepts any liability and will not be responsible under any circumstance for any cost or expense incurred to respond to this RFQ or otherwise participate in the procurement process.

Indemnification.

All respondents agree to hold harmless and indemnify PEA and PGCC, their officers, employees, agents, consultants and representatives, individually and collectively (for purposes of this section, the "Indemnified Party"), from and against, and shall assume all liability for, any and all losses, expenses, demands, claims or damages of any kind whatsoever (including loss of use), including losses, expenses, or damages sustained by the Indemnified Party, arising out of, related to, or in connection with the respondent's preparation and submission of a Response and any actions the respondent takes in connection therewith, including, but not limited to, the actions of the respondent's principals, members, directors, officers, employees, contractors, consultants, representatives and agents, and shall defend any suit or action brought against the Indemnified Party, based on any such alleged injury (including death) or damage (including loss of use), and shall pay all damages, judgments, costs, and expenses, including attorneys' fees in connection with said demands and claims resulting therefrom.