



ESTILL COUNTY BOARD OF EDUCATION

REQUEST FOR PROPOSAL

Agent of Record Proposal

Estill County Board of Education
253 Main Street
Irvine, KY 40336

Released: February 8, 2019

Opening: March 13, 2019 at 2 pm

Direct questions pertaining to the proposal to:

Jeff Saylor, Superintendent at jeff.saylor@estill.kyschools.us or [606-723-2181](tel:606-723-2181).

Estill County Board of Education (“the District”) will receive sealed proposals until the time and date shown on the cover page. Delays in delivery cannot be waived, regardless of the cause. Mail or deliver the proposal to:

Estill County Board of Education
Attn. Jeff Saylor, Superintendent
253 Main Street
Irvine, KY 40336

Proposals should be marked on the outside in the lower left-hand corner as follows:

“Proposal-Agent of Record”

Proposals will be publicly opened and read at the appointed time. No decision will be made at this time.

Scope of Proposal/Specifications:

The District requests proposals from qualified insurance agents licensed to do business in the Commonwealth of Kentucky to assist the District with marketing, placement and servicing the District's insurance policies for the 2019-2020 school year including the following types of coverage: **Workers Compensation, Property, Equipment, Fleet, and Liability, General, Educators Legal, Sexual Molestation, Law Enforcement, Medical Malpractice for Nurses, and Umbrella.**

The District intends to contract for insurance agent services including, but not limited to, brokerage and insurance marketing, account management, and risk management support services.

The contract will be for one year with the option of renewal for up to four (4) additional one-year terms on a year-to-year basis at the mutual agreement of both parties. It is the District's intent to select the best apparent qualified company or companies to provide these services.

Procurement Process:

The issuance of this Request for Proposal constitutes an invitation to submit a proposal to the District.

The District reserves the right to determine, in its sole and absolute discretion, whether any aspect of a submitted proposal in response to this request sufficiently meets the criteria established, the right to seek clarification from any agent, the right to negotiate with any agent, the right to reject any or all proposals with or without cause, and the right to cancel and/or amend, in part or entirety, the proposal.

The selected insurance agent will submit all required documentation to carriers on behalf of the District in order to obtain coverage and premium quotes. The insurance agent agrees to submit the District's information to all carriers for which the agent is designated the District's agent of record. The agent will negotiate with underwriters on behalf of the District. It will submit either a quote or a declination letter to the District from each carrier contacted. Failure to do so may result in immediate termination of the agent of record designation and may void any quotes the agent has already received and/or submitted, thereby giving an opportunity for the newly designated agent of record to obtain a quote.

After insurance is obtained, the agent will issue certificates of insurance, auto identification cards and other program documents as required. The agent will process endorsements and other program changes as required or as requested by the District.

General Information:

The cost of preparing responses to the proposal will not be allowable as direct or indirect charges under any resulting contract. The District reserves the right to refuse or reject any and all proposals submitted under the proposal request. The District shall be free to accept whichever proposal it deems most advantageous.

None of the statements contained herein shall be construed to be a warranty or representation. The District, its officials, employees, agents and consultants shall not be liable to any persons for any statements herein.

Proposals submitted will be evaluated based on the following criteria:

40 points	Representation/experience of other Kentucky Districts
20 points	Qualifications of agent/employee who will provide services if selected
20 points	Representation of quality insurance carriers
10 points	Claim Success and Advocacy
5 points	Additional Value-added services
5 points	Multiple lines of coverage that can be provided

Proposals will be evaluated based on best apparent qualified bidder considering the services needed by the District as outlined in the Request for Proposal. The District is under no obligation to contact bidders for clarification, but reserves the right to do so.

The responder must insure its submission is complete and all required information is furnished including proper signatures, required responses, and other information outlined in the proposal request. Failure to do so may result in the disqualification of the responder's bid.

The successful applicant(s) will be required to comply with all applicable state and federal fair employment and non-discrimination laws and regulations.

Terms and Conditions:

Agents must have and be able to provide documentation for all applicable local, state, and federal licensing.

Policy beginning and ending dates will coincide with the District's fiscal year which begins on July 1 and ends on June 30.

Either party may terminate the agreement at any time without cause by giving the other party not less than thirty (30) days prior written notice of its intent to terminate.

Adjudication of disputes regarding submittal of proposals or compliance with regulation pertaining thereto shall be under the authority of the District.

No Board Member, officer, or employee of the District shall benefit financially or materially from this agreement except as provided by applicable Kentucky Revised Statutes.

Issuance of this proposal in no way constitutes a commitment by the District to award a contract or to pay any costs incurred in the preparation of a response to this request. The District will assure its best efforts to provide reasonable and timely resolution to questions of policy or procedures as they may affect this bid.

Agent experience and qualifications are a major factor in the selection process. During the life of the contract, agent must insure that qualified, experienced personnel service the contract. Agent experience with Kentucky public schools will be a key consideration.

Format and Content of Proposal:

Proposals shall adhere to the following format:

- Cover page with agent's name, address, and telephone numbers.
- Introductory letter from the agent's principal personnel summarizing experience
- Firm's background, history, and staff
- List of available carriers that can be represented
- List of risk management services that can be provided to the District
- Detail of claims processing procedures
- Responses to Mandatory Response Questions listed on the final page

Submit one (1) original and one (1) copy of the proposal. The cover letter must include the signature of a person having the authority to commit the agency to a contract.

PLEASE ANSWER THE MANDATORY RESPONSE QUESTIONS ON THE FOLLOWING PAGE.

MANDATORY RESPONSE QUESTIONS

Responses to the following questions are mandatory. You may respond to the questions below (and attach any necessary additional pages) or as part of your bid. If you choose to respond within your bid, you must have a section of your bid clearly identified as “Mandatory Responses to Questions: and questions must be numbered and retyped exactly as below.

Your Firm’s Name _____

Authorized Signature _____

- 1. What lines of insurance (Workers Compensation, Property, Liability, etc) are you interested in providing for the District?**
- 2. How many Kentucky or similar sized public school boards do you currently service? What is the length of time you have worked with these boards?**
- 3. Please list the names, contact persons, and telephone numbers of at least three (3) districts you currently serve that may be called as references.**
- 4. What insurance carriers licensed in the state of Kentucky (for the lines of insurance specified in #1) can you access directly? What are their AM Best ratings?**
- 5. Please provide examples of claim successes and advocacy?**
- 6. What additional value-added services do you provide to your Kentucky public school board clients at no additional charge?**
- 7. Are there other additional services you will provide for additional fees? What are they and what are the additional fees?**