



NEWBERG SCHOOL DISTRICT 29J

REQUEST FOR PROPOSAL FOR

INSURANCE AGENT OF RECORD FOR COMPREHENSIVE INSURANCE SERVICES

AMENDED

NEWBERG SCHOOL DISTRICT BUSINESS OFFICE

714 E. Sixth Street
Newberg, OR 97132
Telephone: (503) 554-5004
Facsimile: (503) 537-3237

**Due Date & Time
Tuesday, October 11, 2016 at 2:00 PM**

I. GENERAL INFORMATION:

Newberg School District 29J (District) is seeking written proposals from qualified insurance agents to serve as the Agent of Record for insurance services including various liability coverages, comprehensive, auto and worker compensation, but excluding employee benefits. The District utilizes the insurance benefits of PACE for liability, comprehensive and auto coverage and SDAO for worker compensation.

The Agent of Record should be fully qualified to work with both PACE and SDAO and prepared to provide extensive services and support in the areas listed for a minimum of three (3) years with an option to extend for an additional two (2) years at the District's discretion.

This is a qualified bid process so while overall costs (that are flexible) are a major factor, agents who can provide the most experience and scope of services requested will receive higher marks. The District invites interested agents to complete and submit a proposal.

Newberg School District Business Office must receive the original and three (3) copies of the proposal by **2:00 p.m. on Tuesday, October 11th, 2016**. Proposals must be in a sealed opaque envelope, clearly marked **INSURANCE AGENT OF RECORD PROPOSAL** and should be delivered by mail or in person to the following address:

**Newberg School District
Business Office
Attention: Gwen E. Gardner CFO
714 E Sixth Street
Newberg, Oregon 97132**

Selections of agents to present will commence by Tuesday, October 18, 2016. Presentations will be scheduled for Thursday, October 27, 2016.

Proposals should be prepared simply and economically, providing a straightforward, concise description of proposer's capabilities to satisfy the requirements of the RFP. Special production such as bindings, colored displays, and promotional material are not necessary; however, the proposer should be prepared to present to a selection panel onsite at the District offices. Emphasis should be on completeness and clarity of the content.

Proposals shall be firm for a period of thirty (30) days after the closing date. Each responding proposer may withdraw their proposal if it has not been accepted within thirty (30) days from the RFP closing date.

The award of this contract will be made by the District on the basis of the proposal which, in the District's sole and absolute judgment, will best serve the best interests and needs of the District. The District reserves the right to accept or reject any or all the proposals, and waive any informalities and irregularities in said proposals.

All proposers must provide the information requested in Section III, Proposal Submission Requirements. Failure to respond to any or all requested information may result in disqualification by the District.

Questions, interpretations or clarifications of this RFP must be requested in writing. All questions should be directed to Gwen E. Gardner, CFO. All questions are due by 4:00 PM on Tuesday, September 27, 2016. Send questions to gardnerg@newberg.k12.or.us. It is the Representative's responsibility to check our website at <http://newberg.k12.or.us> for any addenda information.

The Intent to Award will be issued electronically through e-mail, by Gwen E. Gardner, Chief Financial Officer, no later than 4:00 P.M. on Tuesday, November 1, 2016.

II. SCHEDULE OF EVENTS/DATES:

ACTION	DATE
Issue RFP	Wednesday, September 14, 2016
Final Questions Due	Tuesday, September 27, 2016, 4:00 P.M.
Last Addenda Issued	Thursday, September 29, 2016
Proposals Due	Tuesday, October 11, 2016, 2:00 P.M. RFP
Committee to Review Proposals	Thursday and Friday, October 13-14, 2016
Assignment of Interview Appointments	Tuesday, October 18, 2016
Finalist Interviews	Thursday October 27, 2016
Notice of Intent to Award	Tuesday, November 1, 2016, 4:00 P.M.

III. PROPOSAL SUBMISSION REQUIREMENTS:

The proposing agent shall be responsible for preparing an effective, clear, and concise proposal. The proposals must include the following minimum information:

1. Cover letter addressed to Gwen E. Gardner, Chief Financial Officer, and signed by a person legally authorized to bind the applicant to its proposal. The cover letter must include name of the agency, broker and/or agent of record, address, telephone and fax numbers of the agency and email address of the person(s) who are authorized to represent the proposer as well as financial reference: bank name, address, phone, and name and title of bank officer most familiar with the agency's account. The letter should also include that the agent has made no agreements with any company that places it as the sole agent for such company.
2. Proof of licensure in the State of Oregon;
3. Profile of Agency that includes articulation of experience with public sector accounts of similar size and scope of service;
4. Name, title, and qualifications of proposed broker(s) with a minimum of five (5) years' experience in public sector accounts of similar size and scope of service;
5. Name(s), titles, and qualifications of proposed key personnel with experience in public sector accounts of similar size and scope of service;
6. Articulate plan and ability to provide service delivery and support to meet the following scope of work, including examples of reports, if applicable:

- a. Routine and emergent consultation relating to insurance-related issues;
- b. Analysis of District's risk exposure and potential solutions;
- c. Analysis of retention and transfer of risk;
- d. Provide routine and emergent review and consultation of any liability insurance program concerns;
- e. Assist in timely reporting and settlement of claims;
- f. Advocate for the District in marketing and retaining property and casualty insurance, Worker's Compensation, excess insurance and related coverages;
- g. Assist with other insurance matters as required;
- h. Provide detailed renewal calendar, with specific timelines, to be agreed upon by the District and agent;
- i. Present reports regarding approach to Risk Management including updates on regulations, condition of insurance marketplace, new legal requirements, and other applicable changes or duties;
- j. Provide consultation in the area of insurance requirements in contracts/agreements that the District may enter into or request;
- k. Assist with property/casualty loss control;
- l. Ensure that insurance contracts shall be awarded in compliance with OAR 127-10-140;
7. Indicate your firm's approximate annual entity insurance premium volume;
8. References of current clients;
9. The proposal must include the fees/costs and proposed commission rate charged by the Agent Of Record's Insurance Co.

IV. MINIMUM QUALIFICATIONS:

1. Any proposer must be licensed to provide insurance services in the State of Oregon;
2. Authorized to work with PACE and SDAO as insurance providers and have current experience and connections to/with these providers;
3. Demonstrated experience in servicing public sector accounts of equal size, complexity, and scope;
4. Newberg School District is an Equal Opportunity Employer. Each service provider must comply with federal, state and local Equal Employment Opportunity requirements.

V. SELECTION PROCESS:

1. Each proposal received will be evaluated to determine if it meets the stated requirements. Failure to meet these requirements will be cause for eliminating the proposal from further consideration.
2. The District reserves the right to reject any and all proposals, to waive any technicalities, informalities and irregularities, to accept or reject all parts of the proposal, and to be the sole judge of the suitability of the proposals offered.
3. Proposals will be evaluated generally on the following criteria, which is neither weighted nor prioritized:
 - a. Qualifications of the agency
 - b. Qualifications of assigned agency staff
 - c. Ability to meet scope of work and service required
 - d. Fees charged and cost effectiveness of the proposed services
 - e. Interview and presentation

f. Reference checks

4. All submittals in response to this RFP are public records and available for inspection and copying upon request. Any portions of the RFP submittal marked as confidential will not be made public without consent of the consultant prior to the award of the contract.
5. A review committee of qualified professionals will be appointed by the Superintendent or his designee. The proposals received will be evaluated by the review committee. The review committee will submit a recommendation to the Superintendent.

VI. TERMS AND CONDITIONS:

1. Term of Agreement: The District anticipates selecting the Agent of Record to commence services in July of 2017 and continue for at least three (3) years unless terminated earlier in accordance with the provision of the Agreement. Upon satisfactory performance by the Agent of Record, the parties may choose to extend the term Service Agreement for additional one (1) year terms and shall do so by executing a renewal agreement annually.
2. Withdrawal of RFP: Proposals may be withdrawn before the RFP submittal deadline by submitting a written request to Gwen E. Gardner, Chief Financial Officer. Re-submittal before the RFP submittal deadline can be made, however, they may not be re-submitted after the deadline.
3. RFP Costs: All costs incurred in the preparation and presentation of the RFP shall be the responsibility of the responding party to the RFP. All documents submitted as part of the RFP will become property of the District. Requests for specific material to be returned will be considered. Any material submitted that is confidential must be clearly marked as such.
4. Newberg School District Contacts: The designated individual responsible for coordination of the RFP is Gwen E. Gardner, Chief Financial Officer. Any questions relating to this RFP should be directed to Gwen E. Gardner at gardnerg@newberg.k12.or.us only.
5. Proposers who wish to protest the results of the evaluation of proposals must submit a written protest to the District no later than five business days after being notified of the committee's recommendations regarding award of a contract. Protests will be reviewed based upon written documents submitted by the protester, and the District's response will be in writing. The District may award a contract while a protest is pending.