



MOUNT OLIVE TOWNSHIP SCHOOL DISTRICT

227 US Route 206, Suite 10
Flanders, NJ 07836
973.691.4000

Nicole C Schoening, CPA, SFO
Business Administrator
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REQUEST FOR QUALIFICATIONS - RFP# 2024-02 **BROKER OF RECORD – PROPERTY & CASUALTY**

SUBMISSION DEADLINE
THURSDAY, OCTOBER 19, 2023
10:00 a.m

SCOPE OF SERVICES

You must address all of the following points in your proposal for property & casualty and worker's compensation insurance brokerage services. If you feel that an individual item is not applicable to your proposal, you must clearly indicate this in the proposal.

1. Name of firm.
2. Location of firm main office and branches.
3. How many years has the firm been in business?
4. Total number of employees dedicated to servicing property and casualty insurance clients-- total number of service employees who hold a license in the property and casualty authorities.
5. Total number of clients for property/casualty insurance. Indicate the top 5 largest clients and all public sector and non-profit clients in the State of New Jersey.
6. Include five current client references for the brokerage services that you are proposing on. References should be included on the Request for Reference form.
7. Describe the proposed management of the account as specifically as possible. Your response must indicate that overall coordination of the account will be placed with an identified account manager. This individual's functions should be clearly described and any secondary personnel should also be identified and their roles defined. The credentials and experience of all members of your proposed account management team should be detailed. Also, the number of total clients serviced by the proposed management team must be included.
8. Risk Information Systems: Accurate loss data is necessary to plan for renewals, maximize reimbursement and assess the feasibility of alternative risk financing options. Specify your firm's resources for managing information in the following areas: incident/claims loss reporting; loss control data analysis/trending systems; and loss forecasting models/actuarial services. Address your firm's ability and willingness to provide information that would



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facilitate measurement of the School System's internal Risk Management and Risk Financing effectiveness.

9. Risk Management / Loss Control Services: The proposal requires that the responding producer identify and define the available services they have available to respond to the risk management needs of a school system. The following areas should be considered in preparing a response: Risk Management Education; Professional and General Liability Exposure Reviews; Workers' Compensation – Employee Exposures; and Property Insurance and Property Conservation Exposures. The response should incorporate the types of inspections required, instructional services available, and any other Risk Management concerns.
10. How will the designated account team work with the district administrators and staff in implementing any new and/or existing programs?
11. Describe the services your firm routinely performs for its clients?
 - a. Indicate your firm's involvement with the application process, written communications, employee meetings, etc.
12. Describe how your firm would develop specifications for competitive quotes and provide this information to the Business Administrator and/or Board?
13. Describe what other benefits and/or products your firm could provide the district.
14. Describe how your firm would review coverages for the district and evaluate the effectiveness.

Administrative Information Requirements

The Respondent shall, as part of its Proposal Statement, provide the following information:

1. An executive summary (not to exceed two (2) pages) of the information contained in all the other parts of the Proposal Statement.
2. An executed Letter of Proposal.
3. Name, address and telephone number of the firm or firms submitting the Proposal Statement pursuant to this RFP, and the name of the key contact person.
4. A description of the business organization:
 - a) If a firm is a partially owned or a fully-owned subsidiary of another firm, identify the parent company.



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- b) If the Respondent is a partnership or a joint venture or similar organization, provide comparable information as required in (b) above for each member of the partnership, joint venture or similar organization.
 - c) A statement that the Respondent has complied with all applicable affirmative action (or similar) requirements with respect to its business activities, together with evidence of such compliance.
5. The number of years the business organization has been under the current management.
 6. Confirm appropriate federal and state licenses to perform activities.
 7. Insurance Consultant must have a minimum of ten (10) years of experience in insurance consulting/brokerage with a focus on boards of education.
 8. Insurance Consultant should have other boards of a similar size, and must submit a list of all references.
 9. The education, qualifications, experience, and training of all persons who would be assigned to provide services along with their names and titles. The risk manager who will service the school district **MUST** possess both an Agency License and Individual Licenses from the New Jersey Department of Banking and Insurance.
 10. A listing of other engagements where services of the types being proposed were provided in the past five (5) years. This should include other boards of education and other levels of government.
 11. A description of all other areas of insurance consulting/brokerage activities, with emphasis on a description of those services of interest to a board of education client.
 12. Any judgments, claims or suits pending or outstanding against company. If yes, please explain.
 13. Whether the business organization is now or has been involved in any bankruptcy or re-organization proceedings in the last ten (10) years. If yes, please explain.
 14. List all immediate relatives of Principal(s) of Respondent who are Board employees or elected officials of the Board. For purposes of the above, "immediate relative" means a spouse, parent, stepparent, brother, sister, child, stepchild, direct-line aunt or uncle, grandparent, grandchild, and in-laws by reason of relation.



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16. The successful insurance consultant shall be able, when necessary, to meet with the Superintendent, Business Administrator, Negotiations Committee, Board or designee and attend Board meetings, as necessary. Evidence of compliance with this request, as provided to other districts, must accompany this request for proposals.
 17. The successful insurance consultant must provide documentation and financial information, as requested by the Board of Education.
 18. The successful insurance consultant shall list a principal representative assigned to service the district. If the insurance consultant intends to designate an individual who is not an employee, such sub-contractor shall be named and shall provide all of the information required of the ICE as listed in the request for proposal, including but not limited to the financial agreement between the ICE and subcontractor.
 19. The successful insurance consultant shall provide a list of ratings/proof of access to all major insurance companies servicing New Jersey.
 20. Provide any and all awards or recognition received by NJSABO, NJASA, or any other New Jersey school organization, received by you, on behalf of a N.J. school district in any year. Please provide copies of any press releases or specifics of this special recognition demonstrating you and your firm were proven a valuable asset, resource or benefit to a New Jersey school district.

PROFESSIONAL EVALUATION AND RANKING METHODOLOGY

A. SELECTION CRITERIA

Cost Criteria — 20%

1. Fee Proposal

Respondents are to clearly state the standard commission percentages they would collect from the joint insurance funds that represent the Mount Olive school district (New Jersey Schools Insurance Group and School Alliance Insurance Fund). If the respondent receives a contingency fee or extra commission over and above the market's standard commission structure, please provide that documentation or commission amount in their proposal.

Technical Criteria — 40%

Description of Services

Respondents should list all services to be rendered with their explanation in detail on how they will provide the services. Respondents shall also provide evidence of how



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services of similar type were provided to other public/private schools in New Jersey. Respondents, by submitting a proposal acknowledge that they fully understand the scope of service, work and activity to be performed.

Management Criteria — 40%

Business Organization

The respondent shall submit a full description of the business organization to include, but not be limited to:

- Name, address, phone, website, e-mail address and other professional firm or individual information.
- A Listing of all key staff members who will service our school district.
- Resumes of key staff members.
- A list of all current New Jersey public school clients and length of service to each. Please identify the grade level of each school district.
- At a minimum three (3) letters of reference from school district clients.
- Other information concerning individuals of the professional firm that would assist the school district in the evaluation process.
- Awards or Recognitions from NJASBO or any other school district or school associations in New Jersey

PROPOSAL EVALUATION AND CONTRACT AWARD

1. Consultant's proposal shall include all the information required by the RFP including additional information that will support evaluation of the criteria stated below.
2. The Board reserves the right to request post-proposal clarifications and/or to meet with Consultant to discuss Consultant's proposal.
3. It is the intention of the Board to award the contract to the respondent whose response is the most advantageous to the board, price and other factors considered; and who will provide the highest quality service at fair and competitive prices. It is noted for the record that Extraordinary Unspecifiable Services (EUS) procurement process as defined in N.J.S.A. 18A:18A-37(a) and N.J.A.C. 5:34-2.1 et seq., will be used for this proposal.
4. The Board reserves the right to reject all proposals.
5. Any proposal containing false or misleading statements will be rejected.



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BIDDER'S INFORMATION:

NAME OF BIDDER_____

SIGNATURE_____

TITLE OF PERSON SIGNING_____

ADDRESS_____

CITY_____ STATE_____ ZIP_____ TEL.NO._____

DATE_____