Request for Proposal
Insurance Consultant

Illinois Valley Community College (IVCC) is seeking proposals for an insurance consultant to assist IVCC to determine coverage for property/casualty, workers’ compensation, fidelity and surety bonds, and athletic accident insurance to include:

- Review and monitor current policies and coverage
- Review contracts/leases for insurance requirements
- Assist with the bidding process to obtain required insurance coverage on an as needed basis
- Negotiate agreeable renewal terms and pricing with current providers
- Answer questions and inquiries regarding insurance and risk management

Important Dates

Illinois Valley Community College Board of Trustees will accept proposals at IVCC, 815 North Orlando Smith Avenue, Oglesby, Illinois 61348, Attention Pat Reed, Purchasing Director, until 2:00 p.m. on Wednesday, November 1, 2006, for services specified herein. Questions pertaining to this RFP must be made in writing and submitted by mail, e-mail, or faxed to the address listed below by Wednesday, October 18, 2006. To obtain additional copies of this RFP, contact Pat Reed Monday through Friday, 8:00 a.m. – 4:30 p.m., 815-224-0417 or send requests in writing to one of the following addresses:

E-mail: pat_reed@ivcc.edu
Fax: 815-224-0294
Mailing Address: Illinois Valley Community College, Attention: Pat Reed, 815 North Orlando Smith Avenue, Oglesby, Illinois 61348.

General Instructions

The IVCC Board of Trustees reserves the right to reject any or all prices or proposals submitted, waive irregularities, and to accept that RFP which is considered to be in the best interest of the College. Any such decision shall be considered final and not subject to recourse.

No RFP may be withdrawn after the official deadline date. All RFP’s submitted must be valid for a minimum period of ninety (90) days after the deadline date.

Unless we are advised to the contrary, it is understood that the RFP has been submitted in strict accordance with specifications.

IVCC is exempt from Federal Excise Tax and Illinois Retailers Occupational Tax.
List four companies, community colleges preferred, for whom your firm has provided consulting services:

1. NAME: _______________________
   ADDRESS: _______________________
   _______________________
   _______________________
   PHONE: _______________________
   LENGTH OF TIME SERVICES PROVIDED: ______________________
   SPECIFIC SERVICES PROVIDED: _____________________________

2. NAME: _______________________
   ADDRESS: _______________________
   _______________________
   _______________________
   PHONE: _______________________
   LENGTH OF TIME SERVICES PROVIDED: ______________________
   SPECIFIC SERVICES PROVIDED: _____________________________

3. NAME: _______________________
   ADDRESS: _______________________
   _______________________
   _______________________
   PHONE: _______________________
   LENGTH OF TIME SERVICES PROVIDED: ______________________
   SPECIFIC SERVICES PROVIDED: _____________________________

4. NAME: _______________________
   ADDRESS: _______________________
   _______________________
   _______________________
   PHONE: _______________________
   LENGTH OF TIME SERVICES PROVIDED: ______________________
   SPECIFIC SERVICES PROVIDED: _____________________________
# INSURANCE CONSULTANT REQUEST FOR PROPOSAL

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Request for Proposal - Insurance Consultant
Property/Casualty, Workers’ Compensation, Fidelity and Surety Bonds, and Athletic Accident Insurance

1.0 OVERVIEW

Illinois Valley Community College (IVCC) is seeking proposals for an insurance consultant. To avoid a conflict of interest, the insurance consultant will not bid on any of the insurance coverage either individually or on behalf of the consultant’s agency. An impartial review and analysis is required.

2.0 BACKGROUND

Illinois Valley Community College is a comprehensive public community college located in Oglesby, Illinois on a 425-acre campus. The average combined full-time and part-time enrollment is 4200 joined by approximately 453 full and part-time employees.

3.0 TERMS AND CONDITIONS

3.1 Supplemental Information

The firm providing the proposal may be requested to provide supplemental information in addition to that provided in the Sealed Request for Proposal enclosed herein, and may be requested to make an oral presentation to a vendor selection committee and/or to the IVCC Board of Directors.

3.2 General Evaluation Criteria

The Vendor selection committee members will evaluate all proposals received. In general, the committee may not limit its considerations to pricing only. Specific evaluations will be made primarily according to the following criteria:

- Qualifications of the firm and the assigned consultant(s)
- Capabilities of the firm
- Cost/Fees/Expenses
- Staff availability
- Punctuality/Responsiveness/Ability to meet deadlines
- Illinois governmental/community college insurance consulting expertise and experience
3.3 Rights Reserved with Respect to Award

Upon completion of the proposal evaluations, IVCC representatives will meet with one or more of the highest ranked firms as necessary to reach a mutual and complete understanding of the coverage and services to be provided prior to the award.

3.3.1 IVCC reserves the right to reject any or all proposals and/or to waive any irregularities or informality in any proposals. In the event that IVCC cannot negotiate a satisfactory contract with the firm submitting the successful proposal, or said firm does not execute the contract before the award resolution by the IVCC Board, IVCC may give notice to said firm of intent to award the contract to the firm with the next most qualified proposal, or may, if it so chooses, call for new proposals.

3.3.2 If it becomes necessary or appropriate to change any part of the RFP, addendum(s) will be issued to all RFP recipients.

4.0 TECHNICAL REQUIREMENTS

4.1 General Requirements

4.1.1 The broker/agent certifies that the broker/agent is not barred from bidding on the contract as a result of a conviction for either bid-rigging or bid rotating under Article 33E of the Illinois Criminal Code of 1961.

4.1.2 Each firm submitting a proposal must include a certificate of insurance indicating coverage of not less than $1,000,000 errors and omissions insurance. Furthermore, the contracting party shall retain coverage of not less than $1,000,000 throughout the term of retention by IVCC.

4.1.3 Vendors acknowledge all awards are subject to the equal employment opportunity provision of Illinois Human Rights commission.

4.1.4 Firm representatives submitting proposals must be licensed to do business in the State of Illinois.

4.2 Agency Requirements

4.2.1 IVCC expects telephone and FAX access to consulting firm personnel during normal business hours.

4.2.2 IVCC expects a member of the firm to be appointed as a direct representative for IVCC activities and to be available to meet with IVCC personnel as necessary to review specific problems and concerns as well as meeting with the IVCC Board of Trustees.
4.2.3 IVCC expects the firm to have sufficient and knowledgeable staff
on hand to handle insurance questions when presented via telephone,
FAX, or email.

5.0 VENDOR REQUIREMENTS

The responding Vendors are free to format their responses in their own way, but
should include the following information in addition to that specifically required
in the Technical Requirements section above.

5.1 Response Format

IVCC shall be under no obligation to return any proposals or material submitted
by the proposer in response to this RFP. In order to be considered responsive,
proposals should include, but not be limited to the following:

5.1.1 Cover Letter

Proposals shall begin with a letter of introduction, approximately one page
in length, including the official name and address of the Vendor
submitting the proposal, and the name, address and telephone number of
the person(s) who will be authorized to act on behalf of the Vendor during
the proposal process. The cover letter shall be signed by an officer of the
Vendor authorized to bind the Vendor to all commitments made in the
proposal. Unsigned proposals will not be accepted.

5.1.2 Table of Contents

Vendor shall supply a Table of Contents which identifies all material
included in the proposal.

5.1.3 Order of documents

All Vendors’ responses must use the same numbering scheme used in this
RFP. Pages must be sequentially numbered.

5.1.4 Scope of Services That Firm Will Provide.

5.1.4.1 Provide the name of the consultant with your firm who will
have primary responsibility for providing consulting
services to IVCC.

5.1.4.2 List other consultants in your firm who will be available to
IVCC.
5.1.4.3 Describe experience in providing consulting services to governmental/community college clients.

5.1.4.4 Describe ability to meet deadlines and to be responsive to clients.

5.1.4.5 Company Background

A synopsis of the firm making the proposal such as the number of years in business, areas of particular expertise, unique customer services, and any other related information that would provide an overview of the firm.

5.1.4.6 Organization and Staffing

The Vendor will submit a statement describing its organizational structure, the nature and scope of its business operations, its size, number of personnel, number of years in business, and the names of its owners, directors, and/or officers. The Vendor must identify key personnel to be assigned to this account.

5.1.4.7 Disclose any relationships you have with parties selling, brokering, or otherwise influencing the sale of insurance products.

5.1.5 Financial Stability

Proposals must include a brief overview of the agency history and current financial status.

5.1.5.1 A Dun and Bradstreet report, if available

5.1.5.2 Name of Bank

5.1.5.3 Any other related information to aid in the IVCC’s evaluation of the proposer.

5.1.6 References

The Vendor shall list four or more institutions of the same general type as the participating members (community colleges, educational entities, or local government entities) in IVCC as references. The list of references shall include names, addresses and telephone numbers of customer contact personnel for whom the proposer is presently providing the same or similar services.
5.1.7 Non-Collusion Affidavit

In submitting a signed price proposal to IVCC, the Vendor warrants and represents the following:

That it has not paid and agrees not to pay any bonuses, commissions, fees or gratuities to any employee or official of IVCC or to any other Contractor for the purpose of obtaining this contract.

That it has not and will not, directly or indirectly, accept any bonuses, commissions, fees, gratuities, rebates or kickbacks from any individual, contractor, agency and/or company for the purpose of obtaining this contract.

When making recommendations to IVCC concerning decisions about insurance agencies, carriers, third party administrators, contractors and companies for the IVCC’s insurance, the Vendor warrants and represents that it has not and will not, directly or indirectly, accept any bonuses, commissions, fees, gratuities, rebates or kickbacks from any individual, contractor, agency and/or company pertaining to the aforementioned recommendations.

All Vendors responding to this RFP shall include an affidavit of non-collusion, duly signed by the officer of the Vendor who signs the cover letter prescribed in Paragraph 5.1.1.

____________________________________________________
VENDOR SIGNATURE          DATE
5.1.8 Conflict of Interest

Members of the IVCC Board, officers and employees of the college, their spouses, their children, their parents, their brothers and sisters and their children, are prohibited from having or acquiring any contract or any direct pecuniary interest in any contract which will be wholly or partially performed by the payment of IVCC funds.

The insurance consultant will not bid on any of the insurance coverages either individually or on behalf of the consultant’s agency. An impartial review and analysis is required.

5.1.9 Modification or Withdrawal of Proposals

Prices must be firm for ninety (90) days. Any Vendor may withdraw or modify its proposal at any time prior to the scheduled closing time for the receipt of proposals, but no Vendor may withdraw or modify its proposal for a period of ninety (90) days after such date. Only written requests for withdrawal or modification of a proposal will be accepted. Withdrawals or modifications must be addressed in the same manner as proposals, and must be received prior to the scheduled closing time for the receipt of proposals.

Negligence on the part of the Vendor in preparing its proposal confers no right of withdrawal or modification of the proposal after such proposal has been opened.

5.1.10 Rejection of Proposals

IVCC reserves the right to reject any and all proposals received in response to this RFP. Non-acceptance of any proposal will not imply any criticism that the proposal or proposed system was deficient.

5.1.11 Waiver

IVCC’s failure to promptly enforce any of the conditions of this Contract shall not constitute a waiver of any of IVCC’s other rights.

5.1.12 Default

IVCC may terminate the contract at any time hereafter, with or without cause, by giving written notice to the Vendor at the address specified above. Termination shall be effective 90 days from the date of receipt of a written termination notice by the Contractor from IVCC. If IVCC
terminates this coverage other than for breach thereof by the Vendor, IVCC agrees to pay the Vendor, and Vendor agrees to accept as its sole remedy, cancellation charges equal to the remaining unpaid costs accrued and obligated to date of cancellation. In the event of breach or violation by the Vendor of any provision of the contract, IVCC may allow the Vendor a reasonable opportunity to cure the breach prior to termination under this provision. Upon termination of the Vendor for breach by the Contractor, the Contractor assumes liability for all excess costs incurred by IVCC to complete the Scope of Services specified in the Proposal and for the costs associated therewith including engaging professionals and consultants as well as costs, expenses and attorney’s fees incurred in securing such remedy.

5.2 Response Procedures

5.2.1 Response to Request for Proposal

Any response to this RFP will be considered to be a legal offer which may result in a legal and binding contract. All costs for developing proposals in responses to this RFP are the obligation of the Vendor and shall not be charged to IVCC in any manner.

5.2.2 Fee Structure

Cost to assist in the bidding process and review of coverage and recommendations: _________________

Fee structure for additional services, e.g., attending IVCC board meetings, making additional recommendations, etc. Please state whether additional services will be charged by the hour or by project.

Hourly rate for additional services: _________________________

Project fee structure for additional services: _________________________

5.2.3 Terms of Contract:

One year with annual review.
5.2.4 Submission of Proposal

One (1) signed original and two (2) copies of the proposal must be received no later than 2:00 p.m., Wednesday, November 1, 2006. The proposal must be addressed to:

Illinois Valley Community College
Attention: Pat Reed, Director of Purchasing
815 N. Orlando Smith Ave.
Oglesby, Illinois 61348

Unsigned proposals will not be considered.

5.2.5 Key Dates

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release of RFP by IVCC</td>
<td>October 12, 2006</td>
</tr>
<tr>
<td>Deadline for Written Questions</td>
<td>October 18, 2006</td>
</tr>
<tr>
<td>submitted for Response</td>
<td></td>
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<tr>
<td>Deadline for Submission of Proposals</td>
<td>November 1, 2006</td>
</tr>
<tr>
<td>IVCC Board Approval of Selection</td>
<td>To be determined</td>
</tr>
<tr>
<td>Proposed Start Date of Implementation</td>
<td>To be determined</td>
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Request for Proposal

Insurance Consultant