

**MSD of Washington Township (MSDWT)
Request for Proposals (RFP)
May 2023**

MSDWT is seeking proposals to provide property and casualty insurance brokerage and risk management consulting services on a fee for services basis. We are looking for a long-term partnership with the selected agency to include proactive services and expertise in handling the needs of a large public school district. The agency must have contracts with the major writers of coverage in the state of Indiana that can provide the desired insurance coverage for a large school district and the ability to put together our program in the most cost-effective manner.

The process involves evaluation of the written responses to this RFQ. The appointed agency will have full access of the marketplace upon being designated MSDWT “Agent of Record”.

The timeline for this process in 2023 is as follows:

May 17	Approval from Board for RFP process to take place.
May 19	Phase 1 – Release of Preliminary Agent/Brokerage questionnaire
June 9	Phase 2 – Written response to questionnaire due by 4:00pm via electronic copy
June 21	Phase 3 – Top 2 Finalists in-person presentations and interviews
June 28	Phase 4 – Agents provided with permission to go to market with specified carriers provided by the school corporation
July 10	Phase 5 – Proposals with cost due to the school corporation
July 13	Phase 6 – Participants notified of the final decision
July 19	Phase 7 – Agent/Broker/Carrier Recommendation to the School Board for vote
September	<i>New Property/Casualty and Workers’ Compensation Policies Take Effect</i>

Please forward all questions in writing to Rebecka Smith, the Chief Business Officer of MSDWT at Rsmith@msdwt.k12.in.us. The winning agency must furnish a certificate of insurance evidencing errors and omissions insurance not less than \$1,000,000 per claim. **MSDWT reserves the rights to include or eliminate any agency at its sole discretion.**

The selection criteria will be based on but not limited to:

1. Comfort level with the strength and service capabilities of the agency
2. Expertise and Experience in handling Public Schools in Indiana
3. Brokerage services offered
4. Agent compensation
5. School References
6. Relevant carriers represented and knowledge of the insurance marketplace
7. Agency account team

Background: MSDWT is a PreK-12 public school corporation which houses approximately 10,400 students and 1,700 staff. MSDWT encompasses one Early Learning Center, eight grades K-5 Elementary School buildings, three grades 6-8 Middle School buildings, one grades 9-12 High School building in addition an Alternative Learning Center, Administration building, Facility and Transportation buildings. Total property value is estimated at \$555 million. Annual payroll is approximately \$90 million. Will send copies of our existing insurance policies for those that request them.

Agency Questionnaire

1. Provide a brief description of your agency and the agency's servicing office for MSDWT including office location.
2. Provide the account service team and the background of those that would be working directly with us.
3. Provide a listing of your directly contracted insurance carriers that write Property, General Liability, School Leaders Errors and Omissions, Auto, Cyber and Umbrella for Public Schools in the State of Indiana. Please note how many of your districts that your proposed service team lead writes in Indiana with each carrier noted.
4. Explain the options you have available in offering worker's compensation for your Public School Districts in Indiana.
5. List the Public-School Districts handled directly by the proposed service team lead for our account along with the primary contact's name, phone number, email address, and where they are located.
6. Provide your proposed annual service plan.
7. Provide a list of legal counsel engaged by the insurance carrier to represent the client in claims.
8. Explain any special areas of expertise you have developed regarding coverage aspects of writing Public School Districts in Indiana.
9. Explain how you stay on top of what is going on in the Indiana Public School insurance marketplace?
10. Explain any benchmarking you provide for your school districts from a loss and coverage standpoint?
11. Describe any specialty resources your agency has available to service our needs.
12. What differentiates your agency from your competitors?
13. Provide your proposed amount of annual compensation.
14. Explain your marketing process for Public Schools.
15. How do you analyze coverage and limits available to advise us?
16. Give examples of helping us prevent claims.
17. Describe your claims management process.
18. Disclose your proposed fee for services and the term of each particular fee.