



SOUTHERN LEHIGH SCHOOL DISTRICT
5775 MAIN STREET, CENTER VALLEY, PENNSYLVANIA 18034
Telephone: 610-282-1030 Fax: 610-282-2462

Request for Qualifications Professional Service - EUS Insurance Broker of Record Services

February 21, 2024

GENERAL INFORMATION

The Southern Lehigh School District (District) requests proposals for Insurance Broker service providers (Vendor) duly licensed and certified pursuant to applicable law to provide services as the broker of record for the District's General Liability Commercial Package Insurance.

INVITATION FOR PROPOSAL

The Southern Lehigh School District requests proposals to provide broker services to the District. We seek an agency that will perform an extensive review of our current plan to make recommendations on how to ensure appropriate lines of coverage while minimizing our overall costs to meet our required obligations. Additionally, we seek a firm that can work with us in the future to continually monitor the industry and recommend alternatives to the current system designed to limit overall exposure through best practices in risk management.

Six (6) copies of the proposal shall be placed in a sealed envelope marked "INSURANCE BROKER" and delivered to the Business Office on or before 10:00 A.M. on March 21, 2024.

The Southern Lehigh School District reserves the right to reject any and all proposals in full and/or in part and to waive any informality in bidding. In determining the appropriate broker, the Southern Lehigh School District reserves the right to consider, in addition to price, the compatibility, quality, experience of the broker, the sufficiency of resources of the broker as relates to the offering as well as the ability of the Bidder to provide future service. The decision of the Southern Lehigh Board of Education shall be final. Please direct all questions to Louis J. Pepe, the District Business Manager, Southern Lehigh School District, 5775 Main Street, Center Valley, Pennsylvania 18034.

The Southern Lehigh School District does not discriminate on the basis of race, sex, color, creed, age, handicaps, or national and ethnic origin in the administration of its educational or employment policies.

There is no expressed or implied obligation for the District to reimburse responding persons/Vendors for any expenses in preparing proposals in response to this request.

To be considered, six (6) copies of a proposal must be received by the District by 10:00 am, Thursday March 21, 2024. Proposals should be submitted to Louis J. Pepe, Director of Business Services of Southern Lehigh School District, 5775 Main Street, Center Valley, PA 18034. Electronic submissions should be sent to pepel@slsd.org. Submissions should follow the detailed directions found under Proposal Format and Submission Procedure.

During the evaluation process, the District reserves the right, where it may serve the District's best interest, to request additional information or clarifications from proposers, or to allow corrections to submit or omissions. The District may require vendors submitting proposals to make oral presentations as part of the evaluation process. If selected vendors will be notified to present to a committee.

It is anticipated that the selection will be completed by May 13, 2024.

BACKGROUND

The District is a local governmental unit created by the Commonwealth of Pennsylvania to provide education services to students living within Southern Lehigh. The Board of School Directors governs the District.

The District educates approximately 3,000 students in grades kindergarten through 12th grade. The District has an operating budget in excess of \$70,000,000 and employs approximately 400 full-time and part-time employees.

The District consists of 1 High School, 1 Middle School, 1 Intermediate School, 2 Elementary Schools, and an Administration Building all of which are on one campus except for the elementary schools.

TERM OF ENGAGEMENT

Services are sought for the 2024-2025 school year, commencing upon appointment, subject to annual review and concurrence by the Board of Education of the District, and the annual availability of appropriations.

DESCRIPTION OF SERVICES

The District is soliciting proposals for services to serve as a risk adviser and insurance broker for our public schools. We seek a firm with a proven track record in working with school districts in Pennsylvania to provide resources including experience in risk management related to:

- COMMERCIAL PACKAGE POLICY
- COMMERCIAL AUTO COVERAGE
- COMMERCIAL LIABILITY UMBRELLA

Our goal is to partner with a risk adviser dedicated to ensuring cost-effective coverage while working in partnership to reduce claims through proven strategies, resources, and solutions. Insurance coverage will be effective as of July 1, 2024. Insurance coverage for this request includes:

- Property including Inland Marine
- Commercial General Liability including Environmental

- Crime
- Automobile
- Educators' Legal Liability/School Board Errors and Omissions Liability
- Umbrella Liability
- Boiler and Machinery
- Cyber Liability

Brokers selected for an interview should be prepared to discuss the following:

- Their company's history and related experience with Pennsylvania school districts
- Their company's personnel and qualifications; and, identification of those persons who will be responsible for handling/servicing our account
- Their company's risk management process, recommendations for loss control and for enhanced coverage.
- Their company's claims management process
- Their company's compensation for insurance services

Each broker will submit evidence of Errors and Omissions coverage.

CONTENT OF PROPOSAL

- Proposal must state the legal name of the Vendor submitting the Proposal, and indicate the Vendor's form of business organization, e.g. sole proprietor, partnership, limited liability Company, or Professional Corporation.
- The Proposal must list the name, professional qualifications, and length of time in the practice of each professional assigned to the management team who may provide services pursuant to the service provider's engagement.
- The Proposal must be signed by a person legally authorized to bind the Vendor submitting the Proposal.
- Statement of Qualifications, including proof of appropriate certification and licenses.
- Provide three references of clients similar to the school district. References should include name, title, phone number, and e-mail address.

PROPOSAL SUBMISSION

Six (6) complete sets of the Proposal are to be submitted to the District by 10:00 am, Thursday, March 21, 2024, and clearly labeled as follows:

Louis J. Pepe, SFO
 Director of Business Services
 Administrative Building
 5775 Main Street
 Center Valley, PA 18034

Re: Insurance Broker Services

LAWS AND REGULATIONS

The insurance services provider shall comply with all laws, ordinances, rules, and regulations that may govern the work as specified by the Office of Insurance Product Regulation and Administration of the Pennsylvania Insurance Department.

The Southern Lehigh School District intends to appoint the successful broker on May 13, 2024 so the broker of record status is established, and so that the successful broker can solicit premium quotations from insurance carriers for the 2024-2025 fiscal year. Insurance companies utilized must be admitted to do business in Pennsylvania.

INTERESTED BROKERS ARE NOT BEING ASKED TO SUBMIT SPECIFIC INSURANCE PREMIUM QUOTATIONS BY THE TIME OF THE INTERVIEW. ONCE APPOINTED, THE SUCCESSFUL BROKER WILL PROPOSE POLICIES THAT INCLUDE THE FOLLOWING:

- Firm quotations for the period of coverage indicated
- A full outline of coverages and limits of liability
- The specific naming of the insurance carriers and the carriers' most recent Best Key rating
- Any endorsements or exclusions must be specified. Any changes to the district's existing coverage must be outlined in a cover memo that accompanies the quotation
- All proposed policies must be Non-Assessable.

The district requests insurance premium quotations to be available by May 31, 2024.

Note: Broker to present Coverage Quote for All Lines of Coverage for the 2024-2025 School Year consistent with current lines and amounts of coverage unless otherwise agreed to by the Director of Business Services.