



R-20/21-20

Commercial Insurance

Issue Date: 3/12/2021

Questions Deadline: 4/12/2021 08:55 AM (CT)

Response Deadline: 4/12/2021 08:55 AM (CT)

Contact Information

Contact: Heather Falls

Address: Purchasing

702 SE 291 Highway

Lee's Summit, MO 64063-4306

Event Information

Number: R-20/21-20
Title: Commercial Insurance
Type: Request for Proposal
Issue Date: 3/12/2021
Question Deadline: 4/12/2021 08:55 AM (CT)
Response Deadline: 4/12/2021 08:55 AM (CT)
Notes: The Lee's Summit R-7 School District is soliciting insurance proposals for their Property/Casualty Insurance Coverages. The Lee's Summit School District is seeking to award the Property-Casualty Insurance Coverages to one brokerage/agency firm with the experience, professionalism, business integrity and financial stability to act in the capacity of insurance broker-agent representing the District's best interest in consultation, design, procurement, placement, and servicing of the Property-Casualty insurance program. Lee's Summit R-7 School District (or the "District") is requiring proposers to submit their proposals electronically. Electronic submission help eliminate errors, eliminate unnecessary work, and is more friendly to the environment. Lee's Summit R-7 School District will not accept proposals that are submitted via email or fax machine. The District reserves the right to accept or reject any and all proposals and to waive any formalities or technicalities if deemed in the best interest of the District. It is the responsibility of all responders to review the entire proposal, seek clarification of any item or requirement that may not be clear, and check all responses for accuracy before submitting a response.

If you are having difficulty submitting electronically, please contact Heather Falls at 816-986-2195 or email heather.falls@lsr7.net for instructions.

It is the responsibility of interested firms to check <https://lsr7ebid.ionwave.net> for any addendums or notices of information prior to the opening date and time of this RFP.

Billing Information

Address: 301 NE Tudor Rd
Lee's Summit, MO 64086-5702
Phone: (816) 986 x1000

Bid Attachments

4_-_MO_Tax_Exemption_Certificate.pdf

Missouri Tax Exemption Certificate

[View Online](#)

3_-_E-Verify-LSR7_(1)_(1).pdf

E-Verify

[View Online](#)

1_-_Sample_Insurance_Certificate.pdf

Certificate of Insurance

[View Online](#)

General Terms & Conditions for RFPs, RFQs and Bids.pdf

General Terms and Conditions

[Download](#)

2021 Data Collection - Building (protected).xlsx

2021 Data Collection

[View Online](#)

Exposure Schedules EDP (Protected).xlsx

Exposure Schedules EDP

[View Online](#)

Lee's Summit Loss Emergence 2020.pdf

Lee's Summit Loss Emergence 2020

[View Online](#)

QUESTIONNAIRE.pdf

QUESTIONNAIRE

[View Online](#)

Specifications.pdf

Specifications

[View Online](#)

2021 Declaration-Summary.pdf

2021 Declaration-Summary

[View Online](#)

Bid Attributes

1	<p>Introduction</p> <p>The Lee's Summit R-7 School District is soliciting insurance proposals for their Property/Casualty Insurance Coverages. The Lee's Summit School District is seeking to award the Property-Casualty Insurance Coverages to one brokerage/agency firm with the experience, professionalism, business integrity and financial stability to act in the capacity of insurance broker-agent representing the District's best interest in consultation, design, procurement, placement, and servicing of the Property-Casualty insurance program. Lee's Summit R-7 School District (or the "District") is requiring proposers to submit their proposals electronically. Electronic submission help eliminate errors, eliminate unnecessary work, and is more friendly to the environment. Lee's Summit R-7 School District will not accept proposals that are submitted via email or fax machine. The District reserves the right to accept or reject any and all proposals and to waive any formalities or technicalities if deemed in the best interest of the District. It is the responsibility of all responders to review the entire proposal, seek clarification of any item or requirement that may not be clear, and check all responses for accuracy before submitting a response.</p>
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2 Instructions to Respondents

1. All questions regarding this RFP shall be submitted online via the "Questions" tab of this bid opportunity. The District reserves the right to reject any and all proposals, to waive technical defects in proposals, and to select the proposal(s) deemed most advantageous to the District.
2. It is the responsibility of each respondent before submitting a proposal to examine the documents thoroughly and request written interpretation or clarifications soon after discovering any conflicts, ambiguities, errors, or omissions in the proposal documents. Requests for clarification must be submitted online via the "Questions" tab.
3. Changes to the specifications will not be allowed except by written addendum issued by the District through this online procurement system. Oral explanations or instructions given prior to award will not be binding.
4. Respondent shall quote net costs of all goods and services requested and all quotes shall include all transportation to destination and inside delivery.
5. There will be no public opening of the proposals.
6. Acceptance of this proposal or any part thereof, in writing, within ninety (90) days after the closing date, by the District shall constitute a legal and binding agreement; wherein, the vendor shall furnish the services in accordance with the specifications and offeror's proposal on the written order of the District.
7. The District reserves the right to award this contract in its entirety or to split the contract among bidders, whichever is in the best interest of the District. The District may accept any item or group of items of the bid unless qualified by specific limitation of the bidder.
8. To be considered, a firm must have at least three (3) proven clients of similar size to our district.

I have read and understand.

(Required: Check if applicable)

3 SELECTION PROCESS

The proposals will be evaluated by a District Selection Committee (DSC) comprised of selected District personnel. The overall process may consist of two steps: the first being a review and evaluation of all responsive proposals and the second being the interview phase for the short list of respondents selected for interview, if applicable.

Step One: Evaluation of Proposals

Members of the DSC will review and rate each responsive proposal based on the following criteria:

- a. The firm's experience in providing similar services to school districts during the past five (5) years.
- b. Key personnel that will be assigned to the District's project, and their experience with similar projects.
- c. Applicable resources offering quality assurances/quality control procedures; as well as adequacy of team/resources to complete the project within the proposed time-frame.
- d. Project approach including project schedule and detailed approach to complete this project, familiarity with this project, identification of unique issues related to project, and the process proposed for communications with District staff.
- e. Cost

Step Two: Interviews (If deemed necessary)

The Proposal Ranking Sheet for the evaluation of the proposals is included in this RFP. The DSC may request additional submittals.

4 Responding to Attributes

There are attributes, including this one, associated with this proposal. Some are notes and require no response, but most have a required response. **Please select each page from the bottom right-hand side of this list of attributes in order to view the next page of Bid Attributes.**

5 Attachments Required

Be sure to upload all required documents and forms to the "Response Attachments" Tab.

6 Purchase Agreements

Purchase Agreements shall be awarded in accordance with regulations adopted by the Lee's Summit R7 Board of Education and adhere to all applicable purchasing policies. Purchase Agreements will be negotiated with the lowest responsible bidder who meets the qualifications for quality, price, terms of bid, lead time, and determined to be in the best interest of the District. The bid award will be at the sole discretion of the District. The District reserves the right to reject any and all bids in part or in whole, and to accept the bid that is in the best interest of the District.

I have read and understand.

(Required: Check if applicable)

7 Terms of This Bid

The term of this Agreement shall be from the date executed. The District may, at its option, renew the Agreement annually up to seven (7) consecutive years.

I have read and understand.

(Required: Check if applicable)

8 Communications Statement

Communications: Contact between vendors and Lee's Summit R7 personnel during the proposal process or evaluation process is prohibited. Any attempt by vendors during the proposal process to contact Lee's Summit R7 personnel may result in disqualification. All communication shall go through the Purchasing and Contracts Department during this competitive process. All questions received and the corresponding answers will be distributed to all bidders. No verbal responses will be provided. The deadline for questions about this proposal is stated in the Bid Activities and the district will not respond to questions after this time and date. Response to questions will be posted in the form of an addendum to this proposal. The vendors will be responsible for checking the website for any posted addenda.

I have read and understand.

(Required: Check if applicable)

9 General Terms and Conditions

I have downloaded and read the General Terms and Conditions from the ATTACHMENTS tab. By selecting this box, I agree to to the terms and conditions.

I have read and agreed to the T&C

(Required: Check if applicable)

1 0 Proposal Requirement

PROPOSAL REQUIREMENTS

1 1 Scope

Specifications:

PROPERTY/CASUALTY INSURANCE COVERAGES

BUILDING & CONTENTS

Real & Personal Property

SPECIAL PROPERTY COVERAGES

Glass coverage, Automatic Builder's Risk, Property of Others, Newly Acquired Properties, Improvements and Betterments, Outdoor Property and Blanket Earnings and Extra Expense Coverages Catastrophic Violent Acts, Terrorism,

INLAND MARINE COVERAGES

Data Processing Equipment, Data Processing Media, Athletic Equipment, Audio-Visual Equipment,

Laboratory Equipment, Musical Instruments,
Maintenance Equipment, Valuable Papers,
Accounts Receivables, Fine Arts, Lights
Transit coverage, Groundskeeping Equipment &
Misc. Property

GENERAL LIABILITY COVERAGES

Bodily Injury, Property Damage, Personal Injury,
Products and Completed Operations, Teachers Liability
and Corporal Punishment, and other Due Process (I.E.P.) Coverage

MISCELLANEOUS MEDICAL MALPRACTICE

Nurses, Student Nurses and Allied Health Programs

SCHOOL BOARD LEGAL LIABILITY

Errors and Omissions Coverage

AUTOMOBILE COVERAGES

Automobile Liability
Automobile Physical Damage
Garage Coverages

CRIME COVERAGES

Blanket Employee Dishonesty Bond, including Faithful Performance,
Money and Securities Inside, Money and Securities Outside,
Money Orders & Counterfeit Papers & Depositors Forgery

BOILER & MACHINERY (EQUIPMENT BREAKDOWN) COVERAGES

TREASURER'S BONDS

SPECIAL EVENTS LIABILITY

WORKERS' COMPENSATION AND EMPLOYERS LIABILITY

POLLUTION COVERAGE

CYBER LIABILITY

-

-

DISTRICT BACKGROUND:

The District currently serves areas of Eastern Jackson County and North Cass County including Missouri communities such as Lee's Summit, Greenwood, Lake Lotawana, Lake Winnebago and small portions of the City of Kansas City, Missouri. The District encompasses approximately 117 square miles of land. The District has experienced significant growth in the past few decades in the overall total number of students, programs and the number of employees needed to support such a high level of growth. At the present time the estimated number of students is 18,479.

At the present time, the District has budgeted for approximately 2,646 employees. The breakdown is as follows:

FT Emp: 2,539
PT Emp: 107
-Certified: 1,318
-Non-Cert: 1,328

Please see additional attachments for review and completion in attachments tab

I have read and understand.
(Required: Check if applicable)

1
2 **SPECIFIC REQUIREMENTS OF RFP:**

1. Purchase Agreements shall be awarded in accordance with regulations adopted by the Lee's Summit R7 Board of Education and adhere to all applicable purchasing policies. Purchase Agreements will be negotiated with the lowest responsible bidder who meets the qualifications for quality, price, terms of bid, and service, and determined to be in the best interest of the District. The RFP award will be at the sole discretion of the District. The District reserves the right to reject any and all bids in part or in whole, and to accept the proposal that is in the best interest of the District.
2. The successful respondent(s) must agree to accept the District's Purchase Order or the District's Mastercard P-card for the order. These purchases are tax exempt.
3. The Lee's Summit R7 School District will review all proposal submissions with regards to pricing, product performance, and equipment features. The District plans to award the RFP within 30 days after the RFP opening.
4. Firm must have experience in servicing all aspects of insurance and risk management needs of District and must provide a confidential list of all school district accounts now serviced by the firm's local office.
5. Firms must represent or have access to the major insurance companies that are markets for School Districts.
6. **The firm must provide, per the Request for Proposal, insurance companies that are licensed and admitted in the state of Missouri and have a Best's Rating of A:VI or higher.**
7. Insurance firm's local office staff must consist of personnel with experience, underwriting and rating ability to determine the school district's hazards and exposures and recommend and place proper coverage for such at equitable premium rates.
8. Insurance firm's staff must be able to provide competent building insurance valuation through the use of appraisal guides available to them through various insurance organizations.
9. Insurance firm's staff must have qualified personnel to work and monitor claims management and loss prevention activities with insurance companies or third party administrators.
10. Insurance firm must have a primary Account Executive and an Office Assistant for the School District account and designate a secondary Account Executive as backup.
11. **Insurance firm must carry Broker-Agents Errors & Omissions Liability insurance with a minimum limit of \$5,000,000.**

1
3 **Schedule of RFP Process**

Timeline for RFP Process:

The timeline listed below is the District's estimation of time required to complete the RFP process. All efforts shall be made to abide by this schedule; however, it is subject to change due to different circumstances.

RFP Notification 3/18/2021
Receive Proposals 4/19/2021
School Board 5/20/2021
Notice to Proceed 1/1/2022

The District desires the execution of the contract to meet the following dates: Services need to begin after 12/31/2021.

1
4 **No Deviations or Exceptions**

Bidders are expected to bid on the items as listed on the Equipment Specifications List, or Scope of Work. If there are any deviations from the specifications or scope of work listed, the bidder is expected to make note, along with a brief description in the next below. The District reserves the right to determine the successful bidder and will make that decision based on the best interest of the District.

I have read and agree.
(Required: Check if applicable)

1
5

Deviations and Exceptions

If your company intends to deviate from the Specifications listed in the attached documents, all such deviations and exceptions must be listed here, with complete and detailed conditions and information included. The District will consider any deviations or exceptions in its bid award decisions. The District reserves the right to accept or reject any proposals based upon any deviations indicated below.

If none, please enter N/A (Not Applicable).

(Required: Maximum 4000 characters allowed)

1
6

Cooperative Procurement with Other Jurisdictions

This section is optional; it will not affect the agreement.

1) Sales will be made in accordance with the prices, terms, and conditions of the Request for Proposals and any subsequent term agreement.

2) There shall, however, be no obligation under the cooperative procurement agreement for any organization represented by MACPP or MARC to utilize the proposal or agreement unless they are specifically named in the Request or Proposals as a joint respondent.

3) All sales to other jurisdictions will be made on purchase orders issued by that jurisdiction. All receiving, inspection, payments and other agreement administration will be the responsibility of the ordering jurisdiction.

4) Each jurisdiction that is a party to the joint proposal has authority to act as Administrative Contracting Officer with responsibility to issue purchase orders, inspect and receive goods, make payments and handle disputes involving shipment to the jurisdiction.

If the District awarded you the proposed agreement, would you sell under the prices and terms of this agreement to any public school district or any other non-profit organization having membership in the Mid-America Council of Public Purchasing (MACPP) or Mid-America Regional Council (MARC) and located within the greater Kansas City metropolitan trade area? (All deliveries shall be F.O.B. Destination and there shall be no obligations on the part of any member of said Council to utilize this agreement).

Yes No

(Optional: Check only one)

1
7

Consultant Profile

CONSULTANT PROFILE

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8

Lead Consultant Name

Enter the Lead Consultant Firm(s) (or Joint Venture) name.

(Required: Maximum 1000 characters allowed)

19 **Lead Consultant Address**
Enter the Lead Consultant Firm(s) (or Joint Venture) address.
street
city, state zip

(Required: Maximum 4000 characters allowed)

20 **Lead Consultant Provider**
Please designate the service area provided by the lead consultant.
 Local Regional National
(Required: Check only one)

21 **Year Provider Firm Established**
Please enter the year the provider's firm was established.

(Required: Numbers only)

22 **Years of Experience**
Please enter the number of years of experience providing this service.

(Required: Numbers only)

23 **Licensed in Missouri**
Are you licensed to do business in the State of Missouri?
 Yes No
(Required: Check only one)

24 **Principal Contact**
Please provide name, title, telephone number and email address of Principal contact

(Required: Maximum 4000 characters allowed)

25 **Address of Office to Perform Work**
Please provide address of office to perform work if different than Lead Consultant Firm address.

(Optional: Maximum 4000 characters allowed)

26 **Number of Persons Committed to District's Project**
Please list the number of persons by discipline that your Firm/Joint Venture will commit to the District's project

(Required: Numbers only)

27 **Joint Venture Areas of Responsibility**
If submittal is by Joint Venture or utilizes subcontractors, list participating firms/providers and outline specific areas of responsibility (including administrative and technical) for each firm.

(Optional: Maximum 4000 characters allowed)

28 **Has This Joint Venture Previously Worked Together?**
Has This Joint Venture Previously Worked Together?
 Yes No
(Optional: Check only one)

29 **Key Outside Consultants**

Key Outside Consultants

(Optional: Maximum 1000 characters allowed)

30 **Subcontractor #1 Name**
Please provide name of Subcontractor.

(Optional: Maximum 1000 characters allowed)

**3
1** **Subcontractor #1 Address**
Please provide address of Subcontractor.

(Optional: Maximum 1000 characters allowed)

**3
2** **Specialty/Role with this Project**
Provide Subcontractors Specialty/Role with this Project.

(Optional: Maximum 1000 characters allowed)

**3
3** **Worked with Lead Firm Before?**
Worked with Lead Firm Before?
 Yes No
(Optional: Check only one)

**3
4** **Year Firm Established**
Year Firm Established

(Optional: Numbers only)

**3
5** **Years of Experience**
Please provide number of years experience providing this service.

(Optional: Numbers only)

**3
6** **Subcontractor #2 Name**
Please provide name of subcontractor #2.

(Optional: Maximum 1000 characters allowed)

**3
7** **Subcontractor #2 Address**
Please provide address of subcontractor #2

(Optional: Maximum 1000 characters allowed)

**3
8** **Specialty/Role with this Project**
Please provide subcontractors specialty/role with this project

(Optional: Maximum 1000 characters allowed)

39 **Worked with Lead Firm Before?**
Has this Subcontractor worked with the lead firm before?
 Yes No
(Optional: Check only one)

40 **Year Firm Established**
Please provide year Subcontractors firm was established.

(Optional: Numbers only)

41 **Years of Experience**
Please provide subcontractors number of years of experience.

(Optional: Numbers only)

42 **Resume of Key Personnel**
Resume of Key Personnel

(Optional: Maximum 1000 characters allowed)

43 **Name of Key Personnel**
Provide name of key persons, specialists, or certified staff that shall be assigned to the District's project.

(Optional: Maximum 1000 characters allowed)

44 **Title of Key Personnel**
Provide job title of key personnel assigned to District's project.

(Optional: Maximum 1000 characters allowed)

45 **Assignment**
Experience of Key Personnel: Provide previous or current assignment of key personnel related to this service.

(Optional: Maximum 4000 characters allowed)

46 Name of Firm with which Associated
Experience of Key Personnel: Provide name of firm which assignment was/is associated with.

(Optional: Maximum 4000 characters allowed)

47 Years of Experience with this Firm
Please provide assigned key personnel's experience with this firm.

(Optional: Numbers only)

48 Years of Experience with Other Firms
Please provide assigned key personnel's experience with other firms.

(Optional: Numbers only)

49 Education
Degree(s) or Certification(s)/Year/Specialization

(Optional: Maximum 4000 characters allowed)

50 Types of Licenses Held by Account Executives
Please provide types of licenses held by account executives.

(Optional: Maximum 4000 characters allowed)

51 Agents/Brokers Errors & Omissions Limits and Insurer
Please provide Agents/Brokers Errors & Omissions Limits and Insurer

(Optional: Maximum 4000 characters allowed)

5
2

Other Experience & Qualifications

Please provide other Experience & Qualifications relevant to the proposed project

(Optional: Maximum 4000 characters allowed)

5
3

Project Narrative

Use this space to provide a detailed project approach OR upload a response in the response attachments section.

Including but not limited to:

- Schedule and detailed approach is reasonable/responsive to District’s needs
- Describe Services offered
- Identify any and all proven techniques used
- Roles of all involved parties clearly identified
- Familiarity with project location as evidenced by proposal/interview
- Identify/recognize critical or unique issues specific to the project and unique approaches used elsewhere
- Proposed timeline for implementation of contract
- Proposed communication process

(Required: Maximum 4000 characters allowed)

5
4

PROPOSAL SCORING CRITERIA

PROPOSAL SCORING CRITERIA

5 Evidence of Experience & References with Similar Accounts (Ref & Exp)

5 Evaluation Criteria

Evidence of Experience & References with Similar Accounts (Ref & Exp)

Consider experience and references listed by the firm/provider. Is the firm/provider experienced in providing services similar to that requested in this RFP?

- Familiarity and experience with similar projects.
- Consider the number of years of experience the firm/provider has.
- Consider the number of years the firm has been in business.
- Consider the references given by the firm/provider.

5 Applicable Resources (Personnel Qualifications)

6 Evaluation Criteria

Applicable Resources (Personnel Qualifications)

Evaluate the extent of applicable resources available to the provider to execute the contract.

- Adequacy of proposed number of staff for the district's need.
- Consider experience of person(s) assigned to service the district's contract.
- Consider the qualifications of the staff proposed.
- Standard Quality Assurance/Quality Control program or procedures the firm has in place.

5 Approach and Understanding of Scope

7 Evaluation Criteria

Approach and Understanding of Scope

Evaluate the provider's approach to and understanding of the scope of services required in the RFP as evidenced by the vendor's proposal:

- Detailed approach is reasonable /responsive to District's needs.
- Familiarity with project locations as evidenced by proposal.
- Identify/recognize critical or unique issues specific to the project.
- Roles of all parties clearly identified.

58 **Cost Evaluation Criteria**

Cost

Determination of cost and pricing data:

- Consider the amount of time estimated for supplying staff and the fees associated with it.
- Consider whether all elements of pricing conform to the requirements of the RFP.
- Consider the variety of staffing offered.

59 **REFERENCES**

REFERENCES

60 **How many years has your company been in business?**

(Required: Numbers only)

61 **Names of principal insurance companies you represent as Agent or Broker, which you use for School District accounts**

Please list names of principal insurance companies you represent as Agent or Broker, which you use for School District accounts.

(Optional: Maximum 4000 characters allowed)

62 **References**

List the school districts which you currently insure.

63 **Reference 1**

Reference 1

64 **Reference #1 Contact Person's Name**

(Required: Maximum 1000 characters allowed)

65 **Reference #1 - Contact Person's School District/Business**

(Required: Maximum 1000 characters allowed)

66 **Reference #1 Address**

Enter Street address, city, state, zip code

(Required: Maximum 1000 characters allowed)

67 **Reference #1 Phone Number**

() - ext:

(Required)

68 **Reference #1 Email**

(Required: Email address)

69 **Reference #1: Description of services performed and completion date**

Describe the services performed and completion date of project.

(Required: Maximum 4000 characters allowed)

70 **Reference 2**

Reference 2

71 **Reference #2 - Contact Person's Name**

(Required: Maximum 1000 characters allowed)

72 **Reference #2 - Contact Person's School District/Business**

(Required: Maximum 1000 characters allowed)

**7
3** Reference #2 Address: Street, City, State, Zip Code

(Required: Maximum 1000 characters allowed)

**7
4** Reference #2 Phone Number

(____) ____ - _____ ext: _____

(Required)

**7
5** Reference #2 Email

(Required: Email address)

**7
6** Reference #2: Description of services performed and completion date

Describe the services performed and completion date of project.

(Required: Maximum 4000 characters allowed)

**7
7** Reference #3

Reference #3

**7
8** Reference #3 Contact Person's Name

(Required: Maximum 1000 characters allowed)

**7
9** Reference #3 - Contact Person's School District/Business

(Required: Maximum 1000 characters allowed)

**8
0** Reference #3 Address: Street, City, State, Zip Code

(Required: Maximum 1000 characters allowed)

**8
1** Reference #3 Phone Number

(____) ____ - _____ ext: _____

(Required)

