



**Beaufort County School District**

**Addendum 1**

Solicitation Number: 20-031  
Date Printed: February 13, 2020  
Date Issued: March 11, 2020  
Procurement Officer: Kaylee Yinger  
Phone: 843-322-2349  
Email: [Kaylee.Yinger@beaufort.k12.sc.us](mailto:Kaylee.Yinger@beaufort.k12.sc.us)

**Request for Proposals (RFP)**

DESCRIPTION: **Brokerage Services – Property and Casualty Insurance**  
SUBMIT OFFER BY (Opening Date & Time): **March 16, 2020 2:00 PM EST**  
QUESTIONS MUST BE RECEIVED BY: **March 9, 2020**  
NUMBER OF COPIES TO BE SUBMITTED: **Six (6) Original Signed Copies and One (1) Redacted Version on CD**

**Offers must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior.**

SUBMIT YOUR SEALED OFFER TO EITHER OF THE FOLLOWING ADDRESSES:

MAILING ADDRESS:  
Beaufort County School District  
Procurement Office  
P.O. Drawer 309  
Beaufort, SC 29901-0309

PHYSICAL ADDRESS:  
Beaufort County School District  
Procurement Office  
2900 Mink Point Blvd  
Beaufort, SC 29902

**AWARDS & AMENDMENTS:**

Award will be posted at the Physical Address stated above on or after March 16, 2020. The award, this solicitation, and any amendments will be posted at the following web address: <http://beaufortschools.net>.

You must submit a signed copy of this form with Your Offer. By submitting a proposal or bid, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of ninety (90) calendar days after the Opening Date.

NAME OF OFFEROR: \_\_\_\_\_ (Full legal name of business submitting the offer) ENTITY TYPE: \_\_\_\_\_

\_\_\_\_\_  
AUTHORIZED SIGNATURE (Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above)

\_\_\_\_\_  
PRINTED NAME TITLE

Instructions regarding Offeror's name: Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror above. An offer may be submitted by only one legal entity. The entity named as the Offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, i.e., a separate corporation, partnership, sole proprietorship, etc.

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**(Return Page Two with Your Offer)**

<b>HOME OFFICE ADDRESS</b> (Address for Offeror's home office/ Principal place of business):	<b>NOTICE ADDRESS</b> (Address to which all procurement and contract related notices should be sent):
<b>PHONE NUMBER:</b>	
<b>EMAIL ADDRESS:</b>	

<b>PAYMENT ADDRESS</b> (Address to which payments will be sent):	<b>ORDER ADDRESS</b> (Address to which all purchase orders will be sent):
<input type="checkbox"/> Payment Address Same as Home Office Address	<input type="checkbox"/> Payment Address Same as Home Office Address
<input type="checkbox"/> Payment Address Same as Home Notice Address (check one only)	<input type="checkbox"/> Payment Address Same as Notice Address (check one only)

<b>ACKNOWLEDGEMENT OF AMENDMENTS:</b>	<u>Amendment Number</u>	<u>Amendment Issue Date</u>
Offeror acknowledges receipt of amendments by indicating amendment number and its date of issue.		

<b>MINORITY PARTICIPATION-</b> Are you a Minority Business Enterprise: Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, please include a copy of your certification.
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Questions and Answers:

- 1) Can the District please provide the current insurance brokerage firm?  
Willis Towers Watson
- 2) Can the District please provide the current insurance carriers by line of coverage?  
No, our property and casualty insurance is place through the pool as part of the South Carolina School Boards Insurance Trust (SCSBIT).
- 3) Does the District pay the current broker a fee or is the brokerage firm compensated through standard insurance premium commissions?  
We pay fee for placement of workers' compensation and broker services. Any other fees charged are included in the premium charged by SCSBIT.
- 4) Can the District further explain what is meant by flat annual premium in 3.1.1 Ground Rules and Assumptions question a.?  
I do not see a 3.1.1 question a. If the question pertains to 3.0.1 statement a, then our current P&C program is guaranteed cost with a \$25K deductible and work comp is excess only with a \$450,000 retention. Premiums are subject to audit.
- 5) To provide full financial statements as requested in 4.0.1.4, would the District be able to sign a Non-disclosure agreement which is required by our firm's financial department?  
The BCSD would have to review the Non-disclosure agreement before agreeing to the terms. Note: The BCSD follows all laws governed by the Freedom of Information Act (FOIA) protecting privileged and confidential information which includes financial information.
- 6) Can the District please provide clarification as to how questions in Section 4.1 questions d, e, f, g, h and i apply to this solicitation for insurance brokerage services?  
This information is part of the standard solicitation for BCSD. These items may not be applicable to you or the services you provide.
- 7) Please provide the current broker agreement or agreements if you have more than one broker.  
See attached.
- 8) Five Year Loss runs for all lines of coverage.  
This is not public information and will be provided to the awarded broker.
- 9) Statement of Values  
See attached.
- 10) Current Insurance Schedule (Carriers, Limits, Deductibles and Premiums)  
See attached for P&C. Excess work comp is with Safety National. Deductible \$450,000. Premiums are:  
2019-20 \$93,040

2018-19 \$93,040  
2017-18 \$94,813  
2016-17 \$92,204  
2015-16 \$79,071

We have never had claims enter the excess layer of work comp coverage.

- 11) Last 5 years of percentage increases or decreases in premium.  
See Attached.
- 12) Please forward us a copy of the latest building/contents/inland marine scheduled of insurance including addresses, current values, construction, flood zones, etc.  
See Attached.
- 13) Please provide an outline of the current insurance program structure – carrier, broker, limits and deductibles.  
See Attached.
- 14) Please provide 2013-2020 recently valued loss runs for all the lines of coverage covered in this RFQ.  
This is not public information and will be provided to the awarded broker.
- 15) Please describe the Districts current claim reporting process for all lines of coverage covered in this RFQ.  
Work comp claims reported by individual schools with copy to risk manager.  
P&C reported to risk manager by schools. Risk Manager submits claims.
- 16) Please provide the Districts current risk management and safety manual.  
There isn't one. All administrative rules and manuals are on-line at [beaufortschools.net](http://beaufortschools.net) under "Employees".
- 17) In section 3.0.1.a (Ground Rules and Assumptions): a flat annual premium is requested. Please confirm you are asking for a fee amount, not premium quotes at this time.  
See questions #4.