



## REQUEST FOR PROPOSALS RISK MANAGEMENT SERVICES FOR NEW BEGINNINGS SCHOOLS FOUNDATION

### Purpose

New Beginnings Schools Foundation (NBSF) is soliciting proposals to establish a contract with one (1) qualified and experienced insurance brokerage firm to develop, market, and establish a comprehensive risk management and insurance brokerage program to cover all NBSF schools and its Network Offices for all insurance lines.

Proposals will be considered from qualified and experienced firms who are regularly established in the business of risk management and insurance brokerage services, and who in the judgment of NBSF are financially responsible. Through prior work performed, firms must be able to show evidence of reliability, ability, experience, and personnel to perform the services.

The term of the initial contract is expected to be August 1, 2017- November 30, 2017 with renewable three month extensions through June 30, 2018. Only those Proposers that are identified through this RFP process as sufficiently qualified and experienced will be considered to provide the requested services for the Network. A description of New Beginnings Charter Schools Network, the services needed, and other pertinent information follow in this Request for Proposals (RFP).

All Request for Proposals responses must be submitted in a sealed package or emailed in pdf form to:

New Beginnings Schools  
Foundation 2045 Lakeshore Dr. Ste.  
415  
New Orleans, LA  
70122 Attn: Electrical  
Services  
NO LATER THAN 4:00 P.M. CST ON JULY 9, 2017  
[rfp@newbeginningsnola.net](mailto:rfp@newbeginningsnola.net)

All requests for clarification, additional information, or appointments related to this RFQ must be submitted in writing, fax, or email on or *before June 30, 2017* to:

Ms. Shawanda Raphael  
Executive Assistant to the CEO  
Telephone: (504) 280-2309  
Fax: (504) 280-2312  
[rfp@newbeginningsnola.net](mailto:rfp@newbeginningsnola.net)

**Reservation of Rights**

This RFP is issued to invite vendors to submit information and/or bids. Issuance of this RFP in no way constitutes a commitment by the NBSF to select a vendor and/or reward a contract. New Beginnings Schools Foundation reserves the right, without prejudice, to reject any or all proposals not in compliance with the RFP specifications and may exercise the right to accept or reject any or all proposals submitted. Acceptance of any proposal with contractual terms is dependent on the NBSF’s funding and by the appropriation of funds by the legislature of the State of Louisiana.

A description of New Beginnings Schools Foundation, and other pertinent information follows:

**Background of New Beginnings Schools Foundation**

New Beginnings Schools Foundation is a PK-12<sup>th</sup> grade learning community that innovatively prepares every child, every day for success in life, college, and careers. We view high-quality education as a fundamental right of every child, every. As such, all NBSF students receive respect, encouragement, and the opportunities required to build the knowledge, skills, and attitudes to be successful, contributing members of a global society. NBSF operates Medard H. Nelson, and Pierre A. Capdau at Avery Alexander Elementary Schools, as well as, Lake Area New Tech Early College High School. New Beginnings has provided educational services 2100 students during the 2016-2017 school year.

**Schedule of Events**

Event	Date & Time
RFP released	June 9, 2017
Deadline for receiving proposer written inquiries	June 30, 2017 at 4:00 pm
Deadline to issue responses and answer proposer written inquiries	July 7, 2017 at 4:00pm
Deadline for submitting proposals	July 21, 2017 at 4:00pm
Evaluation of Proposals	July 24, 2017
Notice of Intent to Award	TBA

**Additional Proposal Authorities**

**Subcontracting Information**

The selected firm shall be the prime Proposer responsible to the Network. Proposers may enter sub Proposer arrangements, however, proposers should acknowledge in their proposal total

responsibility for the entire contract, including payment of any and all charges resulting from the contract. If the Proposer intends to subcontract portions of the work, the Proposer should designate, in their response, the specific tasks to be performed by the subProposer.

### **Costs Incurred in Preparation of Proposals**

All costs directly or indirectly related to preparation of a proposals responding to this RFP, any oral presentations required to supplement and/or clarify a proposal, and any reasonable appearance which may be required by the Network in connection with this Request for Proposal, shall be the sole responsibility of the Proposer, and shall not be reimbursed in any manner by the Network.

### **Ownership of Proposals**

All materials submitted in response to this request become the property of the Network. Selection or rejection of a proposal does not affect this right. All proposals submitted will be retained by the Network and not returned to Proposers.

### **Proposals Validity**

All proposals shall be considered valid for acceptance until such time an award is made, unless the Proposer provides for a different time period within its proposal. However, the Network reserves the right to reject a proposal if the Proposer's time period is unacceptable and the Proposer is unwilling to extend the validity of its proposals.

### **Proprietary Information**

Only information which is in the nature of legitimate trade secrets or non-published financial data may be deemed proprietary or confidential. Any material within a proposal identified as such must be clearly marked in the proposal and will be handled in accordance with the Louisiana Public Records Act, R.S. 44:1-44 and applicable rules and regulations. Any proposal marked as confidential or proprietary in its entirety may be rejected without further consideration or recourse.

### **Proposers Inquiry Periods**

An inquiry period is hereby firmly set for all interested Proposers to perform a detailed review of the RFP documents and to submit any written questions relative thereto. *Without exception*, all questions MUST be in writing by an authorized representative of the Proposer and received by the close of business on the Inquiry Deadline date set forth in the Schedule of Events. Inquiries shall not be entertained thereafter. Answers to questions that change or substantially clarify the RFP shall be issued by addendum and provided to all prospective Proposers.

### **Changes, Addenda, Withdrawals**

The Network reserves the right to change the calendar of events at any time. The Network also reserves the right to cancel or reissue the RFP. If the Proposer needs to submit changes, addenda or withdrawals, a written request signed by an authorized representative of the Proposer, cross-referenced clearly to the relevant proposal section shall be submitted prior to the proposal opening, in a sealed envelope. Changes or addenda shall meet all requirements for the proposal.

### **Cancellation of RFP or Rejection of Proposals**

Issuance of this RFP in no way constitutes a commitment by the Network to award a contract.

The Network reserves the right to accept and reject any or all proposals, or to cancel this RFP if in the best interest of the Network to do so.

### **Waiver of Administrative Informalities**

The Network reserves the right, at its sole discretion, to waive administrative informalities contained in any proposal.

### **Acceptance of Proposals Content**

The mandatory RFP requirements shall become contractual obligations if a contract ensues. Failure of the successful Proposers to accept these obligations shall result in the rejection of the proposals.

### **Proposer Requirements**

NBSF expects all Proposers to sufficiently address the following terms within the submitted proposal;

#### **A. Personnel**

1. Proposer must have commercial electrician's credentials issued and recognized by the State of Louisiana contractors board.
2. Agree to submit to NBSF the names, addresses, background checks, and drug screenings of all technicians assigned to render services on school grounds. Agree to provide NBSF with updated lists of staff assigned to school sites.
3. Certifications and credentials must be provided for all persons performing work for NBSF.
4. All work must be supervised by a Master Electrician.
5. All technicians will be escorted and/or monitored by Network personnel during the execution of the work. All technicians must be dressed in apparel clearly marked with proposer's logo.
6. All work performed under this bid must comply with all OSHA, local, state and federal codes relative to the type of work being performed. The awarded vendor must also be aware of and comply with Orleans Parish School Board Rules.
7. Assume all responsibility for hiring, training, and discharging personnel; however, the Network reserves the right to request dismissal of any staff member from service.
8. The awarded vendor(s) must provide 24-hour service and maintain emergency service contacts after normal hours and non-school days throughout the term of this bid and any renewal(s).
9. Response time for all non-emergency calls shall be scheduled and work shall start within a maximum of two days. Response time for all emergency calls shall be a maximum of two hours.
10. It shall be the sole responsibility of the awarded vendor(s) performing services for this contract to safeguard their own materials, tools, and equipment. The District shall not assume any responsibility for vandalism and/or theft of materials, tools, and/or equipment.
11. Agree to repair, at own expense, any damage caused to NBSF property.

## **B. Insurance**

1. Worker's Compensation/Employer's Liability insurance to cover in the amount a minimum of \$1,000,000 each accident/disease each employee/ disease policy limit; including a waiver of subrogation and Alternate Employer endorsements in favor of NBSF.
2. Comprehensive General Liability insurance in the form of comprehensive, contractual insurance, personal injury, broad-form property damage, premises operations and completed operations in an amount of not less than \$1,000,000 per occurrence and \$3,000,000 aggregate; including naming NBSF Schools as additional insured and including a waiver of subrogation in favor of NBSF.
3. Automobile Liability and Physical Damage insurance for an amount of not less than \$1,000,000 for each bodily injury and property damage combined, single limits, and extensions of comprehensive coverage for all leased, owned and hired vehicles; including an Additional Insured Endorsement and a Wavier of Subrogation in favor of NBSF.
4. Excess Umbrella Liability Coverage with a minimum limit of \$5,000,000
5. All employees must be bonded.
6. All of the above mentioned policies will include a provision that NBSF will receive 30 days' advance notice of cancellation or reduction in the limits of liability or coverages.
7. In addition, it is understood and agreed that NBSF will not be held responsible for damage to provider's equipment or vehicle regardless of cause.
8. Insurance requirements are subject to change based upon enrollment trends and NBSF discretion.

### **Proposal Format**

All proposers must have demonstrated a track record of success in the industry, provide professional references, and display sound business practices that show fiscal responsibility. Each proposer is expected to account for all necessary related-costs before offering the requested service at a competitive final price. Proposals should follow the format and order of presentation described below:

#### **Scope of Services and Requirements**

- Renew lines of coverage identified under Special Conditions.
- Prepare an analysis of the existing coverage per line of insurance and to determine the adequacy or inadequacy of coverage provided. A review of gaps in coverage or redundant coverage(s) shall also be conducted.
- Prepare a written report to NBSF Board of Trustees describing various insurance companies contacted and their associated indication(s) for coverage.
- Review the market trends and recommend alternative risk retention levels within the General Liability and Worker's Compensation program

- The analysis shall describe the reasons for any self-insured retention levels based on loss experience and/or decreased pricing affected by an increase in the retained amount. Include a recommendation in favor or against a self-insured retention
- Perform risk management brokerage services, including, but not limited to the following:
  - Loss control engineering
  - Loss trending and analysis for workers' compensation losses and third party tort losses
  - Development of an annual report on the risk management activities
  - Such other risk management brokerage services as may be requested
- Current coverage / plans:
  - NBSF's current policy limits per line of coverage are included in **Appendix A**.
  - NBSF's schedule of locations is provided in **Appendix B**.

**Evaluation of Proposals/Criteria**

All proposals will be reviewed and evaluated to determine compliance with requirements as specified in the RFP. The evaluation of each response will be based on its overall competence, compliance, format, organization, taking into consideration the evaluation criteria below:

Criteria	Maximum Score
1. Staffing Qualifications (staff prior experience, licenses, professional achievements) & Specialized Experience (experience in public school districts and charter schools)	20
2. Proposed strategy/plan (Vendor capacity, shared commitment, business integrity and reputation in the industry)	25
3. Organization (Vendor capacity, shared commitment, business integrity, and reputation in the industry)	10
4. Proposed Fees (cost effectiveness/efficiency)	40
5. Firm is a DBE/MBE entity	5
<b>Total</b>	<b>100</b>

**Firm Structure and Experience**

- Brief History
- Number of employees
- Employee turnover
- Number of years in existence
- Local and overall organizational structure
- Legal and other resources
- General services you are able to provide
- Percentage of business by product line

- Corporate office location and location of the office that will primarily service the account.

### **Non Profit Expertise/Relevant Experience**

- Descriptions/examples of previous experience that may be relevant to servicing the insurance needs of NBSF where insurance spending has been optimized or a desired outcome was achieved. Also, provide a listing of current clients with a similar non-profit structure.

### **Proposed Service Approach**

- Describe your understanding of NBSF's desired services.
- Discuss your firm's philosophy on the process of providing risk management brokerage services, including proposed techniques and methodology to be used for each task.
- Describe your firm's technological capabilities and what resources are available as a result.
- Provide information on resources used for benchmarking.
- Describe available resources utilized to stay current with, and to forecast, industry trends.
- List carriers with which you have affiliations (advisory boards, etc.).
- Describe any services or portion of services, which will be performed by a sub-consulting firm, and provide relevant information on such firm's qualifications and personnel.
- State any difficulties foreseen in performing the designated tasks.

### **Service Team**

- Describe the proposed account team including their name, job title, current responsibilities, number of years of experience in the insurance industry, number of years with your firm, professional affiliations, and professional qualifications of the primary staff who will be assigned to NBSF. Provide resumes of these key individuals as an Appendix to this proposal.
- Include your approach to providing quality customer service and response times on services such as issuance of certificates of insurance and additional insured endorsements.

### **Value Added Services**

- Describe the value added services you would bring if you were selected as broker (e.g. online access, training, reference library, loss control review, valuation assessments).

### **Implementation Plan**

- Supply an outline of an implementation plan including a timeline, key milestones, work streams, roles and responsibilities, and transition from implementation to on-

going management.

**Client References**

- List of three current clients who may be contacted as references. Please also include the number of years you have been working (or worked) with them.

**Conflict of Interest**

- Provide a statement of conflicts your firm; sub-consulting firms and/or key staff may have regarding these services. The statement should not only include actual conflicts, but also any working relationships that may be perceived by disinterested parties as a conflict. If no potential conflicts of interest are identified, state so within your proposal.

**Proposed Fee Structure / Pricing**

- All proposals must state the maximum total compensation for performing risk management brokerage services for the term of the agreement.
- Fee proposals may be submitted on either a flat fee only basis, a commission only basis, or a fee plus commission basis. NBSF reserves the right to select the basis for compensation.
- Describe any performance guarantees you would be willing to include and the metrics that would be used to evaluate your performance.
- All pricing must be typed or written in ink. No erasures or correction fluid is permitted. Pricing will be reviewed based on reasonableness for services being provided, competitive market rates, and fee structure. NBSF is not obligated to select the firm with the lowest fee proposal to perform these professional services.



**CERTIFICATION STATEMENT**

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The undersigned hereby acknowledges she/he has read and understands all requirements and specifications of the Request for Proposals (RFP), including attachments.

**OFFICIAL CONTACT.** Identify the Contact name and fill in the information below: (Print Clearly):

Date: \_\_\_\_\_

Name of Firm: \_\_\_\_\_

Contact Name and Title: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Phone Number with area code: (\_\_\_\_\_) \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Proposer certifies that the above information is true and grants permission to the State or Agencies to contact the above named person or otherwise verify the information I have provided.

By its submission of this proposal and authorized signature below, proposer certifies that:

- (1) The information contained in its response to this RFP is accurate;
- (2) Proposer complies with each of the mandatory requirements listed in the RFP and will meet or exceed the functional and technical requirements specified therein;
- (3) Proposer accepts the procedures, evaluation criteria, mandatory contract terms and conditions, and all other administrative requirements set forth in this RFP.
- (4) Proposer's quote is valid for at least one year from the date of proposer's signature below
- (5) Proposer understands that if selected as the successful proposer, he/she will have ten (10) business days from the date of delivery of final contract in which to complete contract negotiations, if any, and execute the final contract document.

Authorized Signature: \_\_\_\_\_

Typed or Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

## Appendix A

### NEW BEGINNINGS SCHOOLS FOUNDATION INSURANCE SUMMARY OVERVIEW

Attach Insurance Summary

## Appendix B

### NEW BEGINNINGS SCHOOLS FOUNDATION SCHEDULE OF LOCATIONS

New Beginnings Schools Foundation Network Office  
2045 Lakeshore Drive, CERM Building  
New Orleans, LA 70122

Lake Area New Tech Early College High School  
6026 Paris Avenue  
New Orleans, LA 70122

Medard H. Nelson Charter School  
3121 St. Bernard Avenue  
New Orleans, LA 70119

Pierre A. Capdau at Avery Alexander Charter School  
(address)  
New Orleans, LA