

**SOUTHWESTERN OREGON COMMUNITY COLLEGE  
REQUEST FOR PROPOSALS FOR COLLEGE  
INSURANCE AGENT OF RECORD**

The Southwestern Oregon Community College District Board of Education is seeking an Insurance Agent of Record.

The Agent of Record appointed to serve on July 1, 2021, shall transact the insurance business for the College for the 2021-2022 year. This will require consultation with the Board and College staff before insurance contracts are effective July 1, 2021.

**REQUIREMENTS:**

The Insurance Agent of Record shall be licensed as an insurance agent in Oregon. The Agent of Record will have three or more years experience directly relevant to providing insurance services to public agencies in Oregon with budgets in excess of \$20,000,000. Preference will be given to agents with offices in the College District.

The opportunity to transact the insurance business of the College is in lieu of any other fee for consultant and insurance service.

The Insurance Agent of Record will be the insurance consultant to the Board of Education and College administration for the insurance coverage listed below. The consultant will:

- provide the Board of Education and the College staff general insurance information;
- provide advice on coverage;
- provide risk management guidance;
- develop coverage recommendations and proposals.

The Insurance Agent of Record will seek competitive quotes, transact insurance business, and provide services for the College for specified coverage selected by the College staff from the insurance list below.

The College District purchases insurance coverage for:

- 1) Blanket buildings and personal property insurance
- 2) Floater insurance on specified College property
- 3) General liability and specific coverage for special risks
- 4) College Board and Employee Errors and Omissions
- 5) Umbrella protection
- 6) Motor vehicles coverage
- 7) Blanket crime coverage on all employees
- 8) Worker's Compensation coverage including coverage for various student practicums, internships, clinicals, and specific volunteers
- 9) Loss of income and extra expense
- 10) Limited earthquake coverage

*Southwestern Oregon Community College does not discriminate on the basis of race, color, gender, sexual orientation, marital status, religion, national origin, age, disability status, gender identity, or protected veterans in employment, education, or activities as set forth in compliance with federal and state statutes and regulations.*

- 11) Limited flood coverage
- 12) Cyber risk including ERISA, Computer Crime and Funds Transfer coverage
- 13) 403B Bond
- 14) Foundation Board coverage
- 15) Equipment breakdown coverage

TERM OF APPOINTMENT:

The Insurance Agent of Record will initially be appointed for three years beginning July 1, 2021 and ending June 30, 2024. The appointment shall be in accordance with *Board Policy 6031 Appointment of Consultants*. With Board of Education approval, two appointments may be given for a total of five years. After five years, the Board of Education is required by its bylaws to solicit proposals for agent services.

Responses to the following questions must be received by 3:00 p.m., February 16, 2021 at the College, in care of the Vice President of Administrative Services. Faxed proposals will NOT be accepted. Responses must be sealed and clearly marked "Insurance Agent Bid" and sent to:

**Jeff Whitey**  
**Vice President of Administrative Services**  
**Southwestern Oregon Community College**  
**1988 Newmark Avenue**  
**Coos Bay OR 97420**  
**(541) 888-7206**

Questions to be answered by Insurance Agents submitting proposals:

1. Name of Agency
2. Address
3. Telephone and Fax Number
4. Number of years experience providing insurance services to public agencies with budgets in excess of \$20,000,000.
5. Name of agent that would be responsible for College's insurance.
6. Provide a narrative about experiences that match the insurance coverage and services described in the request for proposal solicitation. Separate the narrative into sections about property/casualty insurance and workers' compensation.
7. List clients for whom relevant Insurance Agent of Record services have been provided for the last three to five years. Please provide the name and telephone number of a contact person for each client.
8. Briefly describe your established relationship with insurance companies known to be competitive in community college insurance markets.

9. The tort liability limit for public agencies in Oregon is \$2.4M. What coverage limits would you recommend for the College? Why?
10. Please describe your risk management approach and assistance to the College.

Please submit five copies of the proposal to the College. Insurance agents selected for an interview with the Board of Education may be asked to respond to additional written questions before the interview.

Timetable for selection:

January 11, 2021 – February 16, 2021	Advertisement of Request for Proposal
February 16, 2021, 3:00 p.m.	Last day to submit proposals for consideration
February 16, 2021 – March 8, 2021	Initial screening and selection for Board of Education interviews
March 9, 2021	Notification of agents selected for interview
March 22, 2021	Board of Education interviews
March 23, 2021	Appointment of Insurance Agent of Record

The Board of Education reserves the right to adjust the time table.