

 <b>Amendment 1</b>	Solicitation Number	<b>RFP-2318</b>
	Date Issued	<b>12/03/2018</b>
	Purchasing Officer	<b>Paul MacDonald</b>
	Phone	<b>(843) 661-1161</b>
	E-Mail Address	<b>Pmacdonald@fmarion.edu</b>
	<b>Amendment Date</b>	<b>12/18/2018</b>

DESCRIPTION: **Provide Insurance Brokerage Services for Francis Marion University**

*The Term "Offer" Means Your "Bid" or "Proposal".*

SUBMIT OFFER BY (Opening Date/Time): **01/15/2019 at 2:00 PM EST** See "Deadline for Submission of Offer" provision

QUESTIONS MUST BE RECEIVED BY: ~~12/18/2018 at 2:00 PM EST~~ See "Questions from Offerors" provision

NUMBER OF COPIES TO BE SUBMITTED: **One (1) original in hard copy, one (1) electronic copy, three (3) copies in hard copy clearly marked "COPY", one (1) redacted copy in hard copy and one (1) redacted electronic copy. Financial Considerations must be submitted in one separate, sealed envelope and included as a separate file on the electronic media (USB drive).**

<b>SUBMIT YOUR OFFER TO ONE OF THE FOLLOWING ADDRESSES IN A SEALED PACKAGE.</b>		
MAILING ADDRESS: <b>Francis Marion University  Purchasing Office  P.O. Box 100547  Florence, SC 29502-0547</b>	EXPRESS SHIPPING ADDRESS: <b>Francis Marion University  Central Receiving  4822 E. Palmetto Street  Florence, SC 29506</b>	HAND-DELIVERY: <b>Francis Marion University  Purchasing Office (Room 102)  Stokes Administration Building  4822 E. Palmetto Street  Florence, SC 29506</b>

CONFERENCE TYPE: <b>N/A</b> DATE & TIME: <b>N/A</b>	LOCATION: <b>N/A</b>
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AWARD & AMENDMENTS	An <b>Intent to Award</b> will be posted at the Physical Address stated above on or around <b>01/18/2019</b> . The award, this solicitation, and any amendments will be posted at the following web address: <a href="http://www.fmarion.edu/procurement/solicitationsawards/">http://www.fmarion.edu/procurement/solicitationsawards/</a>
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You must submit a signed copy of this form with Your Offer. By submitting a bid or proposal, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of thirty (30) calendar days after the Opening Date.

NAME OF OFFEROR (Full legal name of business submitting the offer)	OFFEROR'S TYPE OF ENTITY: (Check one)
AUTHORIZED SIGNATURE  (Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above.)	<input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation (tax-exempt) <input type="checkbox"/> Corporate entity (not tax-exempt) <input type="checkbox"/> Government entity (federal, state, or local) <input type="checkbox"/> Other _____
TITLE (Business title of person signing above)	(See "Signing Your Offer" provision.)
PRINTED NAME (Printed name of person signing above)      DATE SIGNED	

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.

STATE OF INCORPORATION (If Offeror is a corporation, identify the state of Incorporation.)

TAXPAYER IDENTIFICATION NO. (See "Taxpayer Identification Number" provision)

# PAGE TWO

(Return Page Two with Your Offer)

HOME OFFICE ADDRESS (Address for offeror's home office / principal place of business)	NOTICE ADDRESS (Address to which all procurement and contract related notices should be sent.) (See "Notice" clause)
	Address
	Area Code - Number - Extension <span style="float: right;">Facsimile</span>
	<a href="#">E-mail Address</a>

PAYMENT ADDRESS (Address to which payments will be sent.) (See "Payment" clause)	ORDER ADDRESS (Address to which purchase orders will be sent) (See "Purchase Orders and "Contract Documents" clauses)
<input type="checkbox"/> Payment Address same as Home Office Address <input type="checkbox"/> Payment Address same as Notice Address ( <b>check only one</b> )	<input type="checkbox"/> Order Address same as Home Office Address <input type="checkbox"/> Order Address same as Notice Address ( <b>check only one</b> )

<b>ACKNOWLEDGMENT OF AMENDMENTS</b> Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue. (See "Amendments to Solicitation" Provision)							
Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date

DISCOUNT FOR PROMPT PAYMENT (See "Discount for Prompt Payment" clause)	10 Calendar Days (%)	20 Calendar Days (%)	30 Calendar Days (%)	<input type="text"/> Calendar Days (%)
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PREFERENCES - A NOTICE TO VENDORS: On June 16, 2009, the South Carolina General Assembly rewrote the law governing preferences available to in-state vendors, vendors using in-state subcontractors, and vendors selling in-state or US end products. This law appears in Section 11-35-1524 of the South Carolina Code of Laws. A summary of the new preferences is available at [www.procurement.sc.gov/preferences](http://www.procurement.sc.gov/preferences).

PREFERENCES DO NOT APPLY WITH THIS SOLICITATION: Per Section 11-35-1524(E)(5) preferences do not apply to procurements conducted pursuant to Section 11-35-1530 of the South Carolina Consolidated Procurement Code.

PREFERENCES - ADDRESS AND PHONE OF IN-STATE OFFICE:

PREFERENCES DO NOT APPLY WITH THIS SOLICITATION: Per Section 11-35-1524(E)(5) preferences do not apply to procurements conducted pursuant to Section 11-35-1530 of the South Carolina Consolidated Procurement Code.

# Amendment 1

## RFP-2318 Insurance Brokerage Services

### AMENDMENTS TO SOLICITATION

- (a) The Solicitation may be amended at any time prior to opening.
- (b) Offerors shall acknowledge receipt of any amendment to this solicitation (1) by signing and returning the amendment, (2) by identifying the amendment number and date in the space provided for this purpose on Page Two, (3) by letter, or (4) by submitting a bid that indicates in some way that the bidder received the amendment.
- (c) If this solicitation is amended, then all terms and conditions which are not modified remain unchanged.

<b>Question 1</b>	On page 2 under Preferences – there is reference to <i>preferences available to in state vendors (SC)</i> ; later in the same box below notes: <i>Preferences Do Not apply to this solicitation</i> . Can you confirm in the evaluation process if Preference will be made to use SC vendors?
<b>Answer</b>	No Change - <b>Preferences do not apply for this solicitation.</b> “Preferences – A notice to vendors...” is to notify vendors of the change to preference regulations <u>only in instances when preferences are to be applied</u> . Per Section 11-35-1524(E)(5) preferences do not apply to procurements conducted pursuant to Section 11-35-1530 of the South Carolina Consolidated Procurement Code.
<b>Question 2</b>	Please clarify the scope of coverage which needs to be placed. The RFP notes Crime and Public Official Dishonesty for the scope of work, then on page 13, upon winning the contractor will consider D&O, Cyber, EPL, and Alcohol Liability. Can you please advise if any of the following coverage placement will also be considered during the RFP process: Property/ EDP / IM, Casualty such as GL, Auto, Professional, Excess, Educators Legal etc., Workers Compensation, Employee Benefits, Student health / student property & liability, International programs.
<b>Answer</b>	No Change - The University indicated details for the policies that are currently in place.  The University acknowledges that we currently do not have a Risk Management office or an individual expressly assigned to risk management responsibilities, therefore the University further indicated potential insurance areas of interest in Section 3 of the solicitation. Though there may be other insurances purchased by the institution, insurances stated in the solicitation are the known areas of interest at this time. The University is only seeking through this solicitation the most advantageous proposal for expert insurance brokerage services to include insurance advisement, recommendations, etc. as detailed in Section III of the document.  The University will work with the winning offeror to explore any other potential insurance opportunities. University leadership will consider and direct all potential insurance purchases in light of budget constraints and acceptable levels of risk.
<b>Question 3</b>	Referencing page 18 of the RFP, if our firm has provided various insurance coverages to other higher education institutions, but not specifically “ <i>cyber risk, D&amp;O, EPLI and commercial crime insurance to other higher education institutions . . .</i> ”, will our proposal be disqualified.
<b>Answer</b>	The University is soliciting this Request for Proposal with the intent of selecting the proposal most advantageous to the University per the specifications of the RFP.

<b>Question 4</b>	What are all the lines of coverage of insurance, including the SC Insurance Reserve Fund, purchased by Francis Marion University?
<b>Answer</b>	<p>The University indicated the potential insurance areas of interest in Section III of the solicitation. Though there may be other insurances purchased by the institution, those are the known areas of interest at this time.</p> <p>Based upon the University’s current level of expertise, the University does not foresee any insurance presently secured by the University through the Insurance Reserve Fund migrating to the winning offeror in the private market. Insurances from the Insurance Reserve Fund include:</p> <ul style="list-style-type: none"> <li>• Automobile Comp and Collision</li> <li>• Data Processing</li> <li>• Building and Personal Property</li> <li>• Inland Marine</li> <li>• Automobile Liability</li> <li>• Medical Professional Liability</li> <li>• General Tort Liability</li> </ul> <p><i>Insurances from the Insurance Reserve Fund <b>exclude</b>:</i></p> <ol style="list-style-type: none"> <li>1. <i>The service or furnishing of “alcoholic beverages”, whether or not for a charge, if a license or permit is required for such activity; or</i></li> <li>2. <i>Any activity which requires a license or permit issued by the South Carolina Department of Revenue for the Manufacture, sale, service, furnishing, distribution, or use of “alcoholic beverages” according to the Title 61 of the South Carolina Code of Laws.</i></li> </ol> <p>The University will work with the winning offeror to explore other potential insurance opportunities. However as noted, University leadership will consider and direct all potential insurance purchases in light of budget constraints and acceptable levels of risk.</p>
<b>Question 5</b>	Provide copies of the policies and/or selected proposals of each including premiums, limits and deductibles.
<b>Answer</b>	<p>The University provided current coverage limits for Commercial Crime and Public Official Dishonesty Insurance on page 13 of the solicitation. The University is not seeking premium quotations at this time and will work with the winning offeror to determine appropriate policies, premiums, limits, and deductibles. Therefore, any additional information regarding the current policies is not relevant. The University is only seeking through this solicitation the most advantageous proposal for expert insurance brokerage services to include insurance advisement, recommendations, etc. as detailed in Section III of the document.</p>

**Vendor:** \_\_\_\_\_

**Authorized Signature:** \_\_\_\_\_  
 (Same signature as individual who signed cover page of the solicitation)

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

**END OF AMENDMENT 1**