



SOQ No. 24-010

Insurance Producer Of Record Services
for Its Property & Casualty Insurance Program

Submission Deadline: May 7, 2024 at 3:30 PM

ATTENTION VENDORS!!!

Please review all pages and respond accordingly, complying with all provisions in the public notice and Jefferson Parish Code of Ordinances Section 2-926 et seq. All submissions must be received on the Purchasing Department's e-Procurement site, www.jeffparishbids.net, by the SOQ submission deadline date and time. Late submissions will not be accepted.

Jefferson Parish Purchasing Department
General Government Building
200 Derbigny Street, Suite 4400
Gretna, LA 70053

Purchasing Specialist II Name: Shanna Folsie
Purchasing Specialist II Email: sfolsie@jeffparish.net
Purchasing Specialist II Phone: (504)-364-2680

REQUEST FOR STATEMENTS OF QUALIFICATIONS
TO PROVIDE
INSURANCE PRODUCER OF RECORD SERVICES
FOR ITS PROPERTY & CASUALTY INSURANCE PROGRAM
2024



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**PUBLIC NOTICE
SOQ 24-010**

**Insurance Producer Of Record Services
for Its Property & Casualty Insurance Program**

The Parish of Jefferson, authorized by Resolution No.143942, is hereby soliciting the submittal of a Statement of Qualifications (General Professional Services Questionnaire) from qualified firms who are interested in representing Jefferson Parish as its Insurance Producer of Record for its Property and Casualty Insurance Program (Parishwide).

Deadline for Submissions: 3:30 p.m., May 7, 2024

General

The insurance program of the Parish of Jefferson (hereinafter referred to as the Parish) consists of a Self-Insured Retention Program for its casualty coverages, auto liability, general liability and workers' compensation, and other fully insured coverages including, flood, property, public officials and employees' liability, crime and other coverages. The Parish is interested in utilizing technology to ensure that its property and casualty insurance program is operating as efficiently as possible. The Parish has used and will use a Producer to market and place policies in its program under the direction of the Director of Risk Management or their designee.

Minimum Requirements for Selection

- A. Ten (10) years' experience as a Producer of Record, with at least one (1) principal (the person or persons who has controlling [authority](#) and/or is responsible for the actions of his/her/its agent(s); Respondeat Superior) having ten (10) years' of experience.
- B. Firms and/or Producers with governmental entity experience within the last ten (10) years.
- C. Firms and/or Producers that have had or currently have an account/client with an annual total cost of risk in excess of \$5,000,000. For the purposes of this SOQ, total cost of risk includes, but is not limited to, third party administrator fees, retained losses, risk control expenses, insurance premiums, and outside consulting fees.
- D. Experience in providing Producer services similar to those outlined in the SOQ.
- E. Annual commercial lines premium volume of \$10,000,000 or greater.
- F. Adequate general liability, workers' compensation and professional liability insurance coverages. Please note that the selected Person or Firm(s) will be expected to meet the insurance requirements as outlined in *Attachment A* before contracting with the Parish.
- G.

Evaluation Criteria

The following criteria shall be used to evaluate each firm submitting a Statement of Qualifications:

- A. Qualification Submission, including but not limited to the Professional Services Questionnaire (Maximum of 25 Points)
- B. Responsiveness to SOQ Format (Maximum of 10 Points)
- C. Location of the principal office, with preference being given to persons or firms with offices located in Jefferson Parish (Maximum of 5 Points)
- D. Technology Solutions (Maximum of 15 Points)
- E. Public Entity Experience (Maximum of 20 Points)
- F. Fee Schedule, Attachment G (Maximum of 25 Points)

The person or firm submitting a Statement of Qualifications (**General Professional Services Questionnaire**) must identify all subcontractors who will assist in providing professional services for the project in the General Professional Services Questionnaire. Each subcontractor shall be required to submit a **General Professional Services Questionnaire** and all documents and information included in the questionnaire. (Refer to Jefferson Parish Code Ordinance, Section 2-928)

All persons or firms (including subcontractors) must submit a Statement of Qualifications (**General Professional Services Questionnaire**) by the deadline. The latest professional services questionnaire may be obtained by contacting the Purchasing Department at (504) 364-2678 or via the Jefferson Parish website at www.jeffparish.net. This questionnaire can be accessed by hovering over "Business and Development" on the website and clicking on the Professional Services Questionnaires option under "Doing Business in Jefferson Parish".

Submissions will only be accepted electronically via Jefferson Parish's e-Procurement site, Central Bidding, at www.centrauctionhouse.com or www.jeffparishbids.net. Registration is required and free for Jefferson Parish vendors by accessing the following link: www.centrauctionhouse.com/registration.php.

No submittals will be accepted after the deadline.

Affidavits are not required to be submitted with the Statement of Qualifications but shall be submitted prior to contract approval.

Disputes/protests relating to the decisions by the evaluation committee or by the Jefferson Parish Council shall be brought before the 24th Judicial Court.

ADV: The New Orleans Advocate: April 17, & 24, 2024

In accordance with provisions of the American with Disabilities Act Amendments Act of 2008, as amended, Jefferson Parish shall not discriminate against individuals with disabilities on the basis of disability in its services, programs or activities. If you require auxiliary aids or devices, or other reasonable accommodation under the ADA Amendments Act, please submit your request to the ADA Coordinator at least forty-eight (48) hours in advance or as soon as

practical. A seventy-two (72) hour advanced notice is required to request Certified ASL interpreters.

**ADA Coordinator/Office of Citizens with Disabilities
1221 Elmwood Park Blvd., Suite 210, Jefferson, LA 70123
(504) 736-6086, ADA@jeffparish.net**

**REQUEST FOR STATEMENTS OF QUALIFICATIONS
FOR
INSURANCE PRODUCER OF RECORD**

PART 1 – ADMINISTRATIVE AND GENERAL INFORMATION

1.1 Background

The insurance program of the Parish of Jefferson (hereinafter referred to as the Parish) consists of a Self-Insured Retention Program for its casualty coverages, auto liability, general liability and workers' compensation, and other fully insured coverages including, flood, property, public officials and employees' liability, crime and other coverages. The Parish is interested in utilizing technology to ensure that its property and casualty insurance program is operating as efficiently as possible. The Parish has used and will use a Producer to market and place policies in its program under the direction of the Director of Risk Management or her designee.

1.2 Purpose

The purpose of this request for Statements of Qualifications (SOQ) is to obtain statements of qualifications and competitive Qualification Submissions from *bona fide*, qualified Persons or Firms who are interested in representing Jefferson Parish as its Insurance Producer of Record for its Property and Casualty Insurance Program. The Insurance Program is briefly described in *Attachments B and C*.

1.3 Goals and Objectives

The Department of Risk Management for the Parish of Jefferson, Louisiana (the Parish) desires to engage the services of a Producer with the following qualifications:

Minimum Qualifications:

- H. Ten (10) years' experience as a Producer of Record, with at least one (1) principal (the person or persons who has controlling authority and/or is responsible for the actions of his/her/its agent(s); Respondent Superior) having ten (10) years' of experience.
- I. Firms and/or Producers with governmental entity experience within the last ten (10) years.
- J. Firms and/or Producers that have had or currently have an account/client with an annual total cost of risk in excess of \$5,000,000. For the purposes of this SOQ, total cost of risk includes, but is not limited to, third party administrator fees, retained losses, risk control expenses, insurance premiums, and outside consulting fees.
- K. Experience in providing Producer services similar to those outlined in the SOQ.

- L. Annual commercial lines premium volume of \$10,000,000 or greater.
- M. Adequate general liability, workers' compensation and professional liability insurance coverages. Please note that the selected Person or Firm(s) will be expected to meet the insurance requirements as outlined in *Attachment A* before contracting with the Parish.

Attestation of these qualifications may be verified via the completed Attachments and independent verification, if necessary.

1.4 Schedule of Events

	<u>Date &</u>	<u>Time (CST)</u>
1. SOQ to be advertised	4/17/2024	By 4:30 p.m.
2. Deadline to receive written inquiries		2 weeks from date of advertisement
3. Deadline to answer written inquiries		1 week from receipt
4. Qualification Submission Due Date	5/7/2024	3:30 p.m.
5. Interviews		TBD
6. Council Selection via resolution		TBD
7. Contract Ratification via resolution		TBD
8. Anticipated Contract Effective Date		September 1, 2024

NOTE: The Parish of Jefferson reserves the right to deviate from these dates.

This request for Statements of Qualifications is not an authorization to approach the Insurance Marketplace or Service Agencies on behalf of Jefferson Parish. The Parish specifically directs that no contact or solicitation of insurance markets or market reservation be made on behalf of the Parish. Failure to comply with this condition may be grounds for disqualification.

1.5 SOQ / Qualification Submission Response Format

Qualification Submissions submitted for consideration should follow the format and order of presentation described below. Failure to meet the Qualification Submission format shall be duly considered during the Evaluation Process.

- A. **Cover Letter:** Containing a summary of the Person or Firm's ability to perform the services described in the SOQ and confirming that Person or Firm is willing to perform those services and enter into a contract with the Parish. The letter shall be signed by a person having authority to commit the Person or Firm to a contract. If Person or Firm is an agency, corporation, partnership or other legal entity, the president, vice-president, secretary or treasurer, or an authorized agent shall sign the Qualification

Submission. Satisfactory evidence of the authority of the person signing for the agency, corporation, partnership or other legal entity shall be attached to the Qualification Submission.

- B. **Table of Contents:** Organized in the order cited in the format contained herein including the Attachments.
- C. **Person or Firm Qualifications and Experience:** The Person or Firm must demonstrate its experience at providing services similar in nature and complexity to the project outlined in this request for Statements of Qualifications.

This includes, but is not limited to, evidence of the following in the Submission:

- (1) Professional training and experience as related to the scope of work;
- (2) Capacity for timely completion of the scope of work, taking into consideration the person's or firm's current and projected workload and professional and support manpower;
- (3) Past and current accomplishments, for which references from clients or former clients may be considered
- (4) Past performance by the person or firm on public contracts;
- (5) The size of the firm based on the number of personnel, as related to the project requirements and/or scope; and
- (6) Technology Solutions

Complete and duly execute Attachments C, D, E, & F as per the SOQ instructions. Failure to complete Attachments may result in your submission being rejected and receiving no further consideration.

- D. **Fee Submission:** Person or Firm's fees and other costs, if any, shall be submitted (see Attachment G). This Fee Submission shall include any and all costs the Person or Firm wishes to have considered in the contractual arrangement with the Parish of Jefferson. The Person or Firm should propose fees for servicing the insurance program as outlined in Attachment B and the SOQ's Scope of Services.

Fees should be presented on an annual basis. These fees should be net of commissions, including any placement service agreements (PSA), or marketing service agreements (MSA) from any insurance policies secured on behalf of the Parish of Jefferson. The Parish of Jefferson will only consider proposals from Proposers willing to place coverage on a flat fee basis, net of commissions, for all lines of coverage other than NFIP as indicated in Attachment B. All NFIP policy coverage will be serviced and

placed on a commission basis by the Producer but shall be excluded from the flat fee proposal amount offered by the Producer.

With the exception of NFIP policy coverage, the following shall apply:

The Producer agrees that no commissions shall be retained; the Producer agrees that no fees from a third party (MGA) shall be retained. Any and all services provided have been pre-agreed to and a fee has been negotiated to fully compensate the Producer for services provided. All commissions, if any, including policies issued by State or Federal Agencies paid to Producer, shall be remitted to the Parish unless prohibited by law. The Producer attests that all commissions remitted to the Parish are not by any means or definition a rebate and are in compliance with applicable Louisiana Law. Terms and conditions of this contract are based purely on a fee for service basis and any deviation from said agreement shall be cause for termination of agreement by the Parish. Any commissions received by the Producer on policies that the carrier cannot or will not remove from the premium will be credited to the annual flat fee paid by the Parish to the Producer.

Please note that the Parish reserves the right to negotiate further terms and conditions, including price, with any of the Person or Firms that submits a response to this SOQ.

E. General Services Questionnaire:

All Persons or Firms, including any subs, if applicable, must obtain, complete, and attach the *Jefferson Parish General Professional Services Questionnaire* as part of the Qualification Submission. Links are provided here for convenience.

(1) General Professional Services Questionnaire: <https://jefferson-parish-government.azureedge.net/General%20Professional%20Services%20Questionnaire.pdf>

(2) SOQ Affidavit: <https://jefferson-parish-government.azureedge.net/documents/departments/purchasing/forms/3-affidavits/07-SOQAffidavit-2014-02-27.pdf>

**Affidavits are not required to be submitted with the Statement of Qualifications, but shall be submitted prior to contract approval, including any subs, if applicable.

1.6 Confidentiality

All documents submitted to the Parish are subject to the Louisiana Public Records Act, LSA-R.S. 44:1 *et seq.*, and may be released when a public records request is made by news media, competitors, or other interested parties, in accordance with the law.

If a Person or Firm deems any document submitted to the Parish under this SOQ contains confidential business data, trade secrets, proprietary information, or data not otherwise

subject to public disclosure, under La. Const. Art I § 5, LSA-R.S. 44:4 or 4.1, or other provisions of law, the Person or Firm shall comply with the requirements of those statutory exceptions to disclosure and clearly mark the documents as "Confidential" prior to delivering or making them available to the Parish.

If the Parish receives a request for the production or disclosure of documents so marked, and otherwise in compliance with a statutory exception, it will decline disclosure and notify the Person or Firm of such request.

However, if any action is commenced against the Parish under the Louisiana Public Records Act, LSA-R.S. 44:1 *et seq.*, or otherwise seeking to compel production or disclosure of the documents, the Person or Firm or any other person asserting the confidentiality privilege of such documents shall defend, indemnify and hold the Parish harmless from any costs, damages, penalties or other consequences of the Parish's refusal to disclose or produce such documents. Failure of the Person or Firm to immediately intervene in such legal action, will authorize the Parish to voluntarily provide the information for disclosure under the supervision of the court.

The Parish assumes no liability for disclosure or use of any document or portion of this SOQ that has not been clearly marked as "confidential", or has otherwise established an exemption from disclosure under the Louisiana Public Records Act, and may use or disclose such unmarked documents as public records.

The Person or Firm is to mark the cover sheet of the Qualification Submission with the following legend, specifying the pages of the Qualification Submission which are to be restricted in accordance with the conditions of the legend:

“The data contained in Pages _____ of the Qualification Submission have been submitted in confidence and contain trade secrets and/or privileged or confidential information and such data shall only be disclosed for evaluation purposes, provided that if a contract is awarded to this Person or Firm as a result of or in connection with the submission of this Qualification Submission, the Parish of Jefferson shall have the right to use or disclose the data therein to the extent provided in the contract. This restriction does not limit the Parish of Jefferson's right to use or disclose data obtained from any source, including the Person or Firm, without restrictions.”

Further, to protect such data, each page containing such data shall be specifically identified and marked “**CONFIDENTIAL.**”

The Person or Firm shall not mark the entire Qualification Submission "confidential" or as information constituting an exception to Louisiana's Public Records Act. If an entire response, submittal or Qualification Submission is so marked, the Parish of Jefferson shall not consider the Qualification Submission for an award of the contract.

Nothing herein shall prohibit the Parish of Jefferson from making any Qualification Submission, including confidential business data, trade secrets, and proprietary information contained therein, available to any other Parish agency, person or organization for the sole purpose of assisting the Parish in its evaluation of the

Qualification Submission. The Parish shall require said individuals to protect the confidentiality of any specifically identified proprietary information or privileged business information obtained as a result of their participation in these evaluations.

1.7 Inquiry

An initial inquiry period is hereby firmly set for all interested Person or Firms to perform a detailed review of the SOQ documents and to submit any written questions relative thereto. **Without exception, all questions MUST be in writing** (even if an answer has already been given to an oral question during the pre-submission conference, if applicable) and received by the close of business on the Inquiry Deadline date set forth in the Schedule of Events.

The Parish of Jefferson shall not and cannot permit an open-ended inquiry period, as this creates an unwarranted delay in the procurement cycle and operations of our agencies and departments. The Parish of Jefferson reasonably expects and requires responsible and interested Person or Firms to conduct their in-depth Qualification Submission review and submit inquiries in a timely manner.

No negotiations, decisions, or actions shall be executed as a result of any oral discussions with any Parish employee or Parish consultant. The Parish shall only consider written and timely communications from Person or Firms.

All communications concerning this SOQ or the SOQ process shall be directed in writing to the Parish's Purchasing Department.

Inquiries shall be submitted in writing by an authorized representative of the Person or Firm, clearly cross-referenced to the relevant solicitation Part. Only those substantive inquiries received by the established deadline shall be considered by the Parish. Inquiries in accordance with this section may be delivered by e-mail or **posted on the Central Bidding site**.

Outside of substantive communication with the SOQ Administrator, no Person or Firm shall contact any Parish of Jefferson elected and appointed officials, agents, directors, servants, employees, or volunteers, regarding any matter related to this SOQ during the SOQ process.

1.8 Changes, Addenda, Withdrawals

If the Person or Firm needs to submit changes or addenda, such shall be submitted through the Jefferson Parish e-Procurement System in the same manner as the original submission, signed by an authorized representative of the Person or Firm, cross-referenced clearly to the relevant Qualification Submission Part, **prior to the Qualification Submission due date**. Such shall meet all requirements for the Qualification Submission. If the Person or Firm chooses to withdraw his Qualification Submission response, the withdrawal notice shall be in writing and received prior to Qualification Submission due date.

1.9 Cost of SOQ / Qualification Submission Preparation

The Person or Firm assumes sole responsibility for any and all costs associated with the preparation and reproduction of any Qualification Submission submitted in response to the SOQ and preparation for oral presentations/discussions and other such expenses, and shall not include this cost or any portion thereof in the offered contract price and terms.

1.10 Qualification Submission Validity

All Qualification Submissions shall be considered valid for acceptance until such time an award is made, unless the Person or Firm provides for a different time period within its Qualification Submission response. However, the Parish reserves the right to reject a Qualification Submission if the Person or Firm's response is unacceptable and the Person or Firm is unwilling to extend the validity of its Qualification Submission.

1.11 Prime Person or Firm Responsibilities

The selected Person or Firm shall be required to assume responsibility for all items and services offered in his Qualification Submission whether or not he produces or provides them. The Parish of Jefferson shall consider the selected Person or Firm to be the sole point of contact with regard to contractual matters, including payment of any and all charges resulting from the contract.

1.12 Written or Oral Discussions / Presentations

Written or oral discussions may be conducted with Person or Firm(s) who submit Qualification Submissions determined to be reasonably susceptible of being selected for award. Qualification Submissions may be accepted without such discussions and awards made on the basis of the initial offers so Qualification Submissions should be complete and reflect the most favorable terms available from the Person or Firm(s).

Any commitments or representations made during these discussions, if conducted, may become formally recorded in the final contract.

Written or oral discussion/presentations for clarification may be conducted to enhance the Parish's understanding of any or all of the Qualification Submissions submitted. Neither negotiations nor changes to vendor Qualification Submissions will be allowed during these discussions. Qualification Submissions may be accepted without such discussions.

1.13 Acceptance of Qualification Submission Content

The mandatory SOQ requirements shall become contractual obligations if a contract ensues. Failure of the selected Person or Firm(s) to accept these obligations shall result in the rejection of the Qualification Submission.

1.14 Contract Negotiations

If for any reason the Person or Firm whose Qualification Submission is most responsive to the Parish's needs, price and other evaluation factors set forth in the SOQ considered, does not agree to a contract, that Qualification Submission shall be rejected and the Parish may negotiate with the next most responsive Person or Firm. Negotiation may include revision of non-mandatory terms, conditions, and requirements. The Parish of Jefferson must approve the final contract form and issue a purchase order, if applicable, or contract, to complete the process.

1.15 Cancellation of SOQ or Rejection of Qualification Submissions

The Parish of Jefferson reserves the right to reject any or all Qualification Submissions received in response to this SOQ, or to cancel this SOQ if it is in the best interest of the Parish to do so.

1.16 Evaluation and Selection

All responses received as a result of this SOQ are subject to evaluation by the Insurance Advisory and Coordination Committee for the purpose of selecting the Person or Firm with whom the Parish shall contract.

To evaluate all Qualification Submissions, the Insurance Advisory and Coordination Committee, whose members have expertise in various areas has been selected. This committee will determine which Qualification Submissions are reasonably susceptible of being selected for award. If required, written or oral discussions may be conducted with any or all of the Person or Firms to make this determination.

Results of the committee shall be made to the Jefferson Parish Council for the Person or Firm(s) whose Qualification Submission(s), conforming to the SOQ, will be the most advantageous to the Parish of Jefferson, price and other factors considered.

The committee may reject any or all Qualification Submissions if none are considered in the best interest of the Parish.

1.17 Award

1.18.1 The award shall be made to the Person or Firm(s) whose Qualification Submission(s), conforming to the SOQ, will be the most advantageous to the Parish of Jefferson. Price or cost components shall be reviewed separate and apart from the technical requirements of the SOQ.

1.18.2 The award may be made on the basis of the initial offer or as noted in Part 1.15.

1.18 Notice of Intent to Award

The Insurance Advisory and Coordination Committee's report shall be forwarded to the Jefferson Parish Council for selection.

After the selection of the Jefferson Parish Council the Department will notify all Persons or Firms who provided a Qualification Submission as to the outcome of the evaluation process.

1.19 Insurance Requirements

The selected Producer shall furnish the Parish with certificates of insurance evidencing coverage(s) required by the SOQ (see *Attachment A*). The certificates for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf. The certificates are to be received and approved by the Parish before the contract will be signed. The Parish reserves the right to require complete certified copies of all required policies, at any time.

1.20 Sub-Person or Firm Insurance

The selected Producer shall include all sub-Person or Firms as insureds under its policies or shall furnish separate certificates for each sub-Person or Firm. All coverages for sub-Person or Firms shall be subject to all of the requirements stated herein for the Person or Firm.

1.21 Indemnification

Notwithstanding the above, the selected Person or Firm shall protect, defend, indemnify, save and hold harmless the Parish of Jefferson, all Parish departments, agencies, boards and commissions, its officers, agents, servants and employees, including volunteers, from and against any and all claims, demands, expense and liability arising out of injury or death to any person or the damage, loss or destruction of any property which may occur or in any way grow out of any act or omission of the selected Person or Firm, its agents, servants, and employees and any and all costs, expense and/or attorney fees incurred by the selected Person or Firm as a result of any claim, demands, and/or causes of action except those for claims, demands, and/or causes of action arising out of the negligence of the Parish, its agents, and/or employees. The successful Person or Firm agrees to investigate, handle, respond to, provide defense for and defend any such claim, demand or suit at its sole expense and agrees to bear all other costs and expenses related thereto, even if it is groundless, false or fraudulent.

1.22 Payment for Services

The selected Producer shall invoice the Department of Risk Management monthly for one twelfth (1/12) of the agreed annual fee. Payments will be made by the Department of Risk Management approximately thirty (30) days after receipt of a properly executed invoice, and approval by the Department of Risk Management. Invoices shall include the contract and order number, using department, product/services purchased and all commissions or fees paid. Invoices submitted without the referenced documentation will not be approved for payment until the required information is provided. Commissions or Fees paid in excess of agreed annual fee shall be refunded to the Parish annually at contract anniversary.

1.23 Assignment

Assignment of any contract, or any payment under a contract, requires the advanced written approval of the Jefferson Parish Council, by council resolution.

1.24 EEOC and ADA Compliance

The selected Producer must agree to abide by the requirements of the following as applicable: Title VI and VII of the Civil Rights Act of 1964, as amended by the Equal Opportunity Act of 1972, Federal Executive Order 11246, the Federal Rehabilitation Act of 1973, as amended, the Vietnam Era Veteran's Readjustment Assistance Act of 1974, Title IX of the Education Amendments of 1972, the Age Discrimination in Employment Act of 1972, and the Producer must agree to abide by the requirements of the Americans with Disabilities Act of 1990.

The selected Producer shall keep informed of and comply with all federal, state and local laws, ordinances and regulations which affect his employees or prospective employees.

Any act of discrimination committed by the Producer, or failure to comply with these statutory obligations, when applicable, shall be grounds for termination of the contract.

1.25 Content of Contract / Order of Precedence

In the event of a conflict among documents, the order of precedence which shall govern is as follows: 1) the final contract; 2) the Request for Statements of Qualifications and addenda (if any); and 3) the Person or Firm's SOQ / Qualification Submission.

1.26 Substitution of Personnel

The Parish intends to include the following condition in any contract resulting from this SOQ:

Substitution of Personnel: If, during the term of the contract, the Producer or sub-Producer cannot provide the personnel as proposed and requests a substitution, that substitution shall meet or exceed the requirements stated herein. A detailed resume of qualifications and justification is to be submitted to the Parish for approval prior to any personnel substitution. It shall be acknowledged by the Producer that every reasonable attempt shall be made to assign the personnel listed in the Producer's Qualification Submission.

1.27 Conflict of Interest

1.27.1 The Person or Firm shall not hire any officer or employee of the Parish of Jefferson to perform any service covered by this Agreement.

1.27.2 The Person or Firm affirms that to the best of his/her knowledge there exists no actual or potential conflict between the Person or Firm's family, business, or financial interests and the services provided under this Agreement, and in the event of change in either private interests or service under this

Agreement, any question regarding possible conflict of interest which may rise as a result of such change will be raised with the Parish of Jefferson.

1.28 Subcontractor

Subcontractor means one who takes a portion of a contract from a professional service provider, and includes but is not limited to any individual, firm, partnership, association, labor union, political committee, corporation, or other legal entity, including their subsidiaries; excluding any full-time employees of the professional service provider; and further excluding mediators and experts used by lawyers under a professional services contract held by the lawyer or law firm.

PART 2 - SCOPE OF WORK / SERVICES

2.1 Scope of Work / Services

All Services are to be carried out under the direction of the Director of Risk Management, and the Insurance Advisory and Coordination Committee, or their designated representative(s). The Producer shall represent and remain committed to acting in the best interest at all times on behalf of the Parish of Jefferson as its Insurance Producer of Record and shall provide all of the following services or those usually implied as a prerequisite for performance of the services whether or not specifically mentioned in this Scope of Services:

- A. Comply with the Parish of Jefferson's renewal timeline (see Attachment D);
- B. Solicit insurance quotations as requested and/or required by the Parish of Jefferson and/or its representatives and provide copies to the Parish of Jefferson and its representatives;
- C. Make known to the Parish of Jefferson all information required by insurers in order to market the Parish of Jefferson's insurance portfolio;
- D. Obtain and compile all exposure and loss run data required by insurers and underwriters in order to market the Parish of Jefferson's insurance portfolio;
- E. Discuss with TPA and/or Legal to provide additional information to underwriters for the renewal process and in controlling claims and minimizing losses;
- F. Assist in preparation of applications and/or supplemental applications for marketing purposes;
- G. Prepare marketing strategy reports identifying anticipated market conditions and proposing a marketing strategy for the Parish of Jefferson's major loss exposure areas prior to policy renewal;
- H. Provide pre-renewal proposal comparing insurance specifications to the quotes received by the Producer;

- I. Maintain effective communication with the Parish of Jefferson and/or its representatives;
- J. Provide a complete list of all markets approached and their responses; review quotes received from insurance companies and/or brokers to determine which ones provide the most comprehensive coverage, review coverage forms, clauses, deductibles, SIRs, limits and exclusions;
- K. Conduct negotiations with interested insurance companies; and negotiations will include establishing the details of policy forms, coverage, premiums, and terms and conditions as per specifications provided by the Parish of Jefferson;
- L. Provide claims advocacy with the insurance carriers;
- M. Issue outgoing Certificates of Insurance as requested by the Parish of Jefferson in a timely manner;
- N. Review all policies and endorsements to be delivered to the Parish of Jefferson for the purpose of confirming their accuracy and conformity to the insurance specifications and the Parish of Jefferson's instructions:
 - 1. Accuracy and completeness of forms and endorsements;
 - 2. Any duplications of coverage;
 - 3. Determine if proper credits have been applied;
 - 4. Deductibles and/or retentions, Aggregate;
 - 5. Efficiency of the insurance program;
 - 6. Coverage applying to all exposures;
 - 7. Sufficient limits relative to exposures;
 - 8. Insurance requirements or implications relating to leases and/or contracts;
- O. Monitor insurance company services/ratings to insure financial stability of insurers. Specifically, Producer is to monitor the insurance carriers' AM Best ratings and provide notice regarding any downgrades of any insurance carriers with which the Parish of Jefferson is contracted;
- P. Perform instructions as given by the Parish of Jefferson, including collection and payment of premiums to the insurers on a timely basis;
- Q. Prepare schedules of insurance;
- R. Prepare insurance binders, review, deliver policies and all documents related to renewal or insurance placement;
- S. Review Audits and assist in audit dispute resolution;

- T. Assist in obtaining complete loss runs from the insurance carriers that the Producer placed coverage;
- U. Attend teleconference meetings as needed [minimum three (3) meetings anticipated per year];
- V. Provide timely information as requested by the Parish of Jefferson and/or its representatives such as insurance policies, coverage forms, claims information, etc.;
- W. Work with the Parish of Jefferson's risk management consultants, when and as directed by the Parish of Jefferson, and provide copies on any and all correspondence between the Parish of Jefferson and Producer, and Producer and insurer, to its risk management consultants related to the Insurance Program as detailed in Attachment B, or those coverages placed by the Producer during the life of the contract with the Parish of Jefferson;
- X. Maintain proper licensing in the State of Louisiana as a Property and Casualty Producer as per Louisiana Department of Insurance licensing guidelines. Producer shall provide the Parish of Jefferson proof that the said license is active by submitting a copy of current license at any other time as requested by the Parish of Jefferson. Producer must notify the Parish of Jefferson immediately in writing if license is suspended or revoked;
- Y. Assist the Parish of Jefferson to resolve coverage disputes; and,
- Z. Notify the Parish of Jefferson of any conflicts of interest regarding services provided.
- AA. Utilize technology to ensure that its property and casualty insurance program is operating as efficiently as possible.

2.2 Period of Agreement

The term of any contract resulting from this SOQ shall begin on (anticipated) the date of full execution of the contract and shall terminate at the end of two years with the option to extend the agreement for two one-year options, upon approval of Jefferson Parish Council.

PART 3 - EVALUATION

The following criteria will be evaluated by the Insurance Advisory and Coordination Committee:

- 3.1 Qualification Submission, including but not limited to the Professional Services Questionnaire** (Maximum of 25 Points)
- 3.2 Responsiveness to SOQ** (Maximum of 10 Points)

3.3 Location of the principal office, with preference being given to persons or firms with offices located in Jefferson Parish (Maximum of 5 Points)

3.4 Technology Solutions (Maximum of 15 Points)

3.5 Public Entity Experience (Maximum of 20 Points)^[MFG1]_[MFG2]

3.6 Fee Schedule, Attachment G (Maximum of 25 Points)

The Qualification Submissions will be evaluated in light of the material and the substantiating evidence presented to the Parish of Jefferson, not on the basis of what may be inferred.

PART 4 - PERFORMANCE STANDARDS

4.1 Performance Requirements

- 4.1.1 At a minimum, the selected Producer shall adhere to the Renewal Timetable.
- 4.1.2 Policies shall be reviewed upon receipt and any required corrections shall be requested in a timely fashion.
- 4.1.3 Requests for policy changes and/or endorsements shall be processed within one week.
- 4.1.4 Correspondence and communications from the Parish or its designated representative shall be responded to within one business day from receipt.
- 4.1.5 Certificates of Insurance will be issued within 24 hours of request.

4.2 Performance Measurement/Evaluation

- 4.2.1 Review of compliance with established timelines.
- 4.2.2 Timeliness of responses
- 4.2.3 Parish satisfaction with day-to-day service.
- 4.2.4 Improvements to Parish's insurance program through coverage enhancements.

LIST OF ATTACHMENTS

The following Attachments are made a part of this SOQ. Please respond completely to all as indicated. Failure to respond may result in your submission being rejected and receiving no further consideration.^[MFG3]

Attachment A	Insurance Producer's Insurance Requirements
Attachment B	Jefferson Parish's Current Insurance Coverages
Attachment C	Renewal Timetable
Attachment D	Insurance Producer Initial Qualifying Questionnaire
Attachment E	List of Prior or Current Public Entity Accounts
Attachment F	List of Accounts with Total Cost of Risk in Excess of \$5,000,000
Attachment G	Fee Schedule

ATTACHMENT A

INSURANCE PRODUCER'S INSURANCE REQUIREMENTS

GENERAL: The selected Producer(s) shall, at its own cost and expense, procure and maintain the insurance as described herein. Said insurance shall remain in full force and effect for the life of the contracted services with the Parish. With respect to professional liability insurance, this insurance shall remain in effect for at least two (2) years after the termination of the contracted services with the Parish. If requested by the Parish, the Producer shall furnish to the Parish a certificate of insurance evidencing the professional liability insurance for a period of two (2) years after the termination of the agreement. The following insurance coverage shall be provided and maintained and shall apply on a primary basis. The total limits of insurance must be equal to or greater than \$1,000,000 per line of insurance, except the professional liability insurance which must be in an amount at least equal to \$5,000,000; however, this is subject to change. Each major line of insurance may have its own set of requirements that must be met. Where indicated as "If Applicable", coverage will only be required if it is necessary for the Producer to perform services for Jefferson Parish which would indicate the need for that coverage. Except for professional liability insurance, claims made insurance policies ARE NOT acceptable. Evidence of insurance coverage will be provided utilizing the ACORD Certificate of Insurance and must be provided prior to the execution of any contract. In addition to the Certificate of Insurance, Jefferson Parish retains the right to request copies of the selected Producer(s)' entire insurance program (policies) in order to further verify coverage.

WORKERS' COMPENSATION:

- State Act
- Federal Acts
 - USL&H, if applicable
 - JONES ACT, if applicable
 - TWM&C, if applicable
- Employers Liability
- Waiver of Subrogation to include both oral and written contracts in favor of Jefferson Parish, its elected and appointed officials, agents, servants, directors, employees and volunteers
- Alternate Employer Endorsement in favor of Jefferson Parish, its elected and appointed officials, agents, servants, directors, employees and volunteers
- Sixty (60) days prior written Notice of Cancellation, non renewal or adverse material change

GENERAL LIABILITY:

- Commercial General Liability Form CG 00 01 (10 93) or pre-approved equivalent
- Additional Insured Endorsement in favor of Jefferson Parish, its elected and appointed officials, agents, servants, directors, employees and volunteers Form (CG 2026 11/85)

- Waiver of Transfer of Rights of Recovery Against Others To Us to cover both oral and written contracts CG 24 04 (93) in favor of Jefferson Parish, its elected and appointed officials, agents, servants, directors, employees and volunteers
- Sixty (60) days prior written Notice of Cancellation, non-renewal or adverse material change

Note: The General Liability Coverage shall not limit Contractual Coverage for this contract in any way that would prohibit or limit the reporting of any claim and the subsequent defense and indemnity that would normally be provided by the policy.

AUTOMOBILE LIABILITY:

- Coverage to be provided for any auto **or** All owned autos **and** Non-owned and hired autos
- Additional insured and Waiver of Subrogation endorsements in favor of Jefferson Parish, its elected and appointed officials, agents, servants, directors, employees and volunteers
- Sixty (60) days prior written Notice of Cancellation, non renewal or adverse material change

PROFESSIONAL LIABILITY:

- Coverage for the Producer's liability for its operations as an insurance producer and/or broker.
- The policy shall contain no exclusionary language as respects the scope of operations to be performed for Jefferson Parish.
- If this policy contains a deductible or retention, it is understood that the Producer is solely responsible for the payment of any deductible and the Parish of Jefferson has no obligation whatsoever to participate in the payment of said deductible, any co-payments, and/or any claims expenses.

ATTACHMENT B

JEFFERSON PARISH'S CURRENT INSURANCE COVERAGES

General Notes:

- Program contains Property, Casualty, and Liability coverages.
- NFIP Flood coverage is currently placed through Hartford Insurance Co. Total Estimated Annual Premium is \$483,44.00; see also "Other Items" table below for count of policies.
- Claims Third Party Administrator for self-insured retentions is CCMSI.
- Insurance Program data provided is for illustrative purposes only.
- Summary Schedule of Insurance follows; this Summary is provided as an overview of the scheduled policies and is not meant to provide all details of coverage, terms, conditions and exclusions that apply.
- **In the interest of competitive responses and except for the NFIP program, current insurance program premiums and costs will not be provided as part of this SOQ.**

Other Items	Total
Outgoing Certificates of Insurance--average, issued annually.	70
Commercial Property Location Count	230
Commercial Auto Vehicle Count	908
Excess Workers' Compensation Payroll Exposure	\$146 million
NFIP Count of Policies (NB: 111 policies renew on April 1 st)	121

The following is a summary listing of insurance coverages that Jefferson Parish currently purchases. The successful Producer will be responsible for these lines of coverage on behalf of the Parish in addition to NFIP coverage.

Type ¹	Description	Insurance	Policy Dates	Limits	Deductible
Accidental Injury	1st & 2nd Parish Court Community Service Program	Great American	4-1		
Accidental injury	Dixie/Dizzy Dean Baseball	Great American	4-1		
Accidental Injury	Jeff. Parish Community Emergency Response Team & Medical Reserve Corps.	Great American	4-1		
Accidental injury	Headstart Program - Parish Wide	Great American	4-1		

¹ Insurance Program data provided is for illustrative purposes only. This Summary is provided as an overview of the scheduled policies and is not meant to provide all details of coverage, terms, conditions and exclusions that apply.

Type ¹	Description	Insurance	Policy Dates	Limits	Deductible
Accidental Injury	Friends of the Animal Shelter Volunteers	Great American	4-1		
Accidental Injury	Recreation Sports/Activities - Parish Wide	US Fire	4-1		
Auto Liability	First Parish Court vehicles	Travelers Indemnity Co.	05/01/23-05/01/24	\$1,000,000	
Auto Liability	Second Parish Court vehicles	Travelers Indemnity Co.	05/01/23 - 05/01/24	\$1,000,000	
Auto Liability	Juvenile Court vehicles	Travelers Indemnity Co.	05/01/23 - 05/01/24	\$1,000,000	
Auto Physical Damage	Parish owned vehicles	Lexington Insurance Co.	05/01/23 - 05/01/24	\$7,500,000	
Boiler & Machinery	Boilers & Electrical panels, etc.	Hartford Steam Boiler	10/01/23 - 10/01/24	\$100,000,000	\$100,000
Crime	CDBG crime policy	Zurich	02/16/23 - 02/16/24		
D&O/Fiduciary	Jefferson Parish Hospital Service District No. 1	StarStone Specialty Ins. Co.	10/01/23 - 10/01/24	\$3,000,000 D&O \$3,000,000 Fiduciary	\$0 IA A D&O \$150,000 IA B D&O \$150,000 IA C D&O \$1,000,000 Clam Fiduciary
Employee Crime	Juvenile Court 1546 Gretna Blvd, Harvey 70059	Travelers	10/01/22 - 10/01/25	3 year policy Annual Installment	
Excess AL and GL	Excess coverage on general liab., auto liab., workers' comp. and public officials liab.	American Alternative Ins.	05/01/23 - 05/01/24	\$4,000,000.00	
Excess D&O	Jefferson Parish Hospital Service District No. 2	Homeland Ins.	10/01/23 - 10/01/24	\$5,000,000 Limit	
Excess Fiduciary	Jefferson Parish Hospital Service District No. 1	Republic Vanguard Ins.	10/01/23-10/01/24	\$2,000,000 excess of \$3,000,000	
Fiduciary	Jefferson Parish Employees' Retirement System	Hudson Ins.	10/01/23 - 10/01/24	\$2,000,000 Agg Lmt	
General Liability	Jefferson Parish Employees' Retirement System	Scottsdale Insurance Co.	10/01/23 - 10/01/24	\$2,000,000.00	
General Liability	Office of Inspector General	Western World	09/01/23 - 09/01/24	\$1,000,000 Occ \$2,000,000 Agg.	
GL/Professional Liability	Head Start Birth to 5 Program	Houston Casualty Co.	10/28/23 - 10/28/24	\$1,000,000 Ech Claim \$3,000,000 Agg.	\$10,000 Ech Claim
Inland Marine	Valuable papers and books (Library)	Everest	10/15/23 - 10/15/24	\$10,000,000 Occ	\$25,000 Ded.
Inland Marine - All Perils	Contractors equip., computers, portable radios, valuable papers, art, ltrons, hand held computers	Travelers Property Casualty Company of America	05/01/23 - 05/01/24	\$26,663,985 CE \$2,986,286 Equip F	\$5,000 Ded.

Type ¹	Description	Insurance	Policy Dates	Limits	Deductible
Inland Marine - Fine Arts	Thomas Jefferson Statue and art works	AXA Art Insurance Corp.	05/01/23 - 05/01/24	\$367,154.00 Max. Occ.	\$50,000 Ded.
Inland Marine - Water Line	Waterline from Lafitte to Grand Isle	Homesite Insurance Co Of Florida	02/23/2023 – 02/23/2024	1,000.000 Limit per Trigger Location (5 locations) Parametric	
Mstr Fire EC	Properties > \$250,000	Great American	04/01/23 - 04/01/24	\$100,000,000 Loss Limit	\$500,000 Ded.
Property	Eoc & Segnette Field	Lloyds	05/01/23 - 05/01/24	1.0% of \$5M WH / 1.0% \$41,138,737 AOP	
Property	Eoc & Segnette Field	QBE Speciality Ins	05/01/23 - 05/01/24	8.5% of \$5M WH / 8.5% \$41,138,737 AOP	
Property	Eoc & Segnette Field	Lloyds	05/01/23 - 05/01/24	2.02% of \$5M WH / 2.0% \$41,138,737 AOP	
Property	Eoc & Segnette Field	Steadfast Ins. Co	05/01/23 - 05/01/24	9.5% of \$5M WH / 9.5% \$41,138,737 AOP	
Property	Eoc & Segnette Field	Old Republic Union	05/01/23 - 05/01/24	4.0% of \$5M WH / 4.0% \$41,138,737 AOP	
Property	Eoc & Segnette Field	GeoVera Speciality Ins	05/01/23 - 05/01/24	18.0% of \$5M WH / 18.0% \$41,138,737 AOP	
Property	Eoc & Segnette Field	Transverse Speciality Ins.	05/01/23 - 05/01/24	18.0% of \$5M WH / 18.0% \$41,138,737 AOP	
Property	Eoc & Segnette Field	National Fire & Marine Ins.	05/01/23 - 05/01/24	33.0% of \$5M WH / 33.0% \$41,138,737 AOP	
Property	Eoc & Segnette Field	Spinnaker Speciality Ins	05/01/23 - 05/01/24	5.0% of \$5M WH / 5.0% \$41,138,737 AOP	
Property	Yenni Bldg., 1st Parish Court & 2nd Parish Court, streets bldg	Travelers Ins. Co.	05/1/23 - 05/01/24	Split per Bldg value.	
Public Employee Dishonesty & Crime	Lapalco Bridge (Harvey Canal crossing)	Chubb	05/01/23 - 05/01/24	\$38,510,074 Limit	\$100,000 Ded.
Public Officials & Employees Liability	Employee theft, misappropriation	Travelers Casualty and Surety Co of America	01/01/23 - 01/01/24	3 year policy Annual Installment	
Public Officials & Employees Liability	Office of Inspector General	Westchester Surplus	01/22/24 - 01/22/25	\$1,000,000 Ech Clm \$1,000,000 Agg.	
WC excess	Elected officials, appointed officials and employees	AIG	10/01/23 - 10/01/24	\$1,000,000 Occ. \$1,000,000 Agg.	\$250,000 Ded.
Wind/Hail	Parish employees	Safety National Casualty Corp.	05/01/23 - 05/01/24	\$25M Specific Limit \$1M EL Limit	\$2M SIR

Type ¹	Description	Insurance	Policy Dates	Limits	Deductible
Wind/Hail	Properties > \$250,000	Swiss Re Solutions	04/01/23 - 04/01/24	Excess 5% \$1.25M p/o \$25,000,000	
Wind/Hail	Properties > \$250,000	Hallmark Speciality	04/01/23 - 04/01/24	Excess 10% \$2,500,000 part of \$25,000,000	
Wind/Hail	Properties > \$250,000	Lexington	04/01/23 - 04/01/24	Excess 22% \$5.5M part of \$25,000,000	
Wind/Hail	Properties > \$250,000	Evanston	04/01/23 - 04/01/24	Excess 10% \$2.5M p/o \$25,000,000	
Wind/Hail	Properties > \$250,000	Fidelis Underwriting Limited	04/01/23 - 04/01/24	Excess 20% \$5.0M part of \$25,000,000	
Wind/Hail	Properties > \$250,000	Arch Speciality	04/01/23 - 04/01/24	Excess 10% \$2.5M part of \$25,000,000	
Wind/Hail	Properties > \$250,000	The Princeton Excess	04/01/23 - 04/01/24	Excess 5% \$2,25M part of \$45,000,000	
Wind/Hail	Properties > \$250,000	Lloyds	04/01/23 - 04/01/24	Excess \$4.15% \$1,867,500 part of \$45M	
Wind/Hail	Properties > \$250,000	Lloyds.	04/01/23 - 04/01/24	Excess 0.25% \$112,500.00 part of \$45M	
Wind/Hail	Properties > \$250,000	Lloyds	04/01/23 - 04/01/24	Excess 1.50% \$675,000.00 part of \$45M	
Wind/Hail	Properties > \$250,000	HDI Global Speciality	04/01/23 - 04/01/24	Excess 0.25% \$112,500.00 part of \$45M	
Wind/Hail	Properties > \$250,000	Covington Speciality Ins.	04/01/23 - 04/01/24	Excess 0.40% \$180,000.00 part of \$45M	
Wind/Hail	Properties > \$250,000	Western World Ins	04/01/23 - 04/01/24	Excess 1.20% \$540,000.00 P/O \$45M	
Wind/Hail	Properties > \$250,000	Lloyds	04/01/23 - 04/01/24	Excess .080% \$360,000.00 P/O \$45M	
Wind/Hail	Properties > \$250,000	Paomar Excess and Surplus	04/01/23 - 04/01/24	Excess 0.70% \$315,000.00 P/O \$45M	
Wind/Hail	Properties > \$250,000	Evanston	04/01/23 - 04/01/24	Excess 0.50% \$225,000.00 P/O \$45M	

Type ¹	Description	Insurance	Policy Dates	Limits	Deductible
Wind/Hail	Properties > \$250,000	Gotham Ins	04/01/23 – 04/01/24	Excess 0.25% \$112,500.00 P/O \$45M	
Wind/Hail	Properties > \$250,000	Fidelis Underwriting	04/01/23 – 04/01/24	Excess 5.50% \$1,000,000.00 P/O \$20M	
Wind/Hail	Properties > \$250,000	<u>Westfield Speciality Ins</u>	04/01/23 – 04/01/24	Excess 10.00% \$2,000,000.00 P/O \$20M	
Wind/Hail	Properties > \$250,000	Lloyds	04/01/23 – 04/01/24	Excess 10.00% \$2,000,000.00 P/O \$20M	
Wind/Hail	Properties > \$250,000	Starstone Speciality Ins	04/01/23 – 04/01/24	Excess 80.00% \$4,000,000.00 P/O \$50M	
Wind/Hail	Properties > \$250,000	Lloyds	04/01/23 – 04/01/24	Excess 12.50% \$3,125,000.00 P/O \$25M	
Wind/Hail	Properties > \$250,000	Houston Casualty	04/01/23 – 04/01/24	Excess 13.00% \$3,250,000.00 P/O \$25M	
Wind/Hail	Properties > \$250,000	Fortegra Speciality	04/01/23 – 04/01/24	Excess 2.00% \$500,000.00 P/O \$25M	
Wind/Hail	Properties > \$250,000	Lloyds	04/01/23 – 04/01/24	Excess 14.00% \$3,500,000.00 P/O \$25M	
Wind/Hail	Properties > \$250,000	Endurance	04/01/23 – 04/01/24	Excess 10.00% \$2,500,000.00 P/O \$25M	
Wind/Hail	Properties > \$250,000	Lloyds	04/01/23 – 04/01/24	Excess 10.50% \$525,000.00 P/O \$5M	
Wind/Hail	Properties > \$250,000	Lloyds	04/01/23 – 04/01/24	Excess 15.00% \$750,000.00 P/O \$5M	
Workers' Compensation	Properties > \$250,000	The Princeton Excess	04/01/23 – 04/01/24	Excess 15.00% \$750,000.00 P/O \$5M	
Workers' Compensation - 1st Parish Ct	Jefferson Parish Employees' Retirement System	Louisiana Workers' Comp. Co.	05/14/23 - 05/14/24	100/500/100	
Workers' Compensation - 2nd Parish Ct	1st Parish Court employees	Louisiana Workers' Comp. Co.	05/14/23- 05/14/24	1M/1M/1M	
Workers' Compensation - Juvenile Ct	2nd Parish Court employees	Louisiana Workers' Comp. Co.	05/14/23 - 05/14/24	1M/1M/1M	
Sexual Abuse	Juvenile Court employees	Louisiana Workers' Comp. Co.	05/14/23 - 05/14/24	1M/1M/1M	
Cyber	JeffCap, Head Start, Birth to Five	Amwins	03/01/23 – 03/01/24	\$3,000,000.00	\$250K

Type¹	Description	Insurance	Policy Dates	Limits	Deductible
Medical Reserve Corp.	Emergency Management	Columbia Casualty	05/01/23 – 05/01/24	\$3,000,000.00	

ATTACHMENT C

RENEWAL TIMETABLE

The successful Producer(s) will be expected to adhere to the following renewal time table. Please confirm your willingness to comply below.

ACTIVITY	COMPLETION DAYS PRIOR TO RENEWAL
Initial Planning Session	150
Request for Conceptual Qualification Submission to Producer	120
Meeting between Director & Producer	110
Producer compiles data for Quotations	105
Information is released to Companies	95
Quotations received by Producer	60
Quotations submitted to Director	45
Quotations Analyzed	30
Coverage Selected	20
Binders Issued	15
Certificates of Coverage Issued	10
Renewal Date	0

I / We agree to adhere to and comply with the above renewal timetable in servicing the Parish's insurance program.

Name of Firm: _____

Signature

Date

Title

ATTACHMENT D

**INSURANCE PRODUCER INITIAL QUALIFYING
QUESTIONNAIRE**

Please note, if applicable, all sub-Producers that will be used on this project must complete this form.

Identifying Information:

Name of Firm: _____

Address: _____

City: _____ State: _____ Zip: _____

Principal of Firm: _____

E-mail Address: _____

Primary Telephone:(____)_____

Firm's Qualifications:

Date Established: _____

Total Number of Employees: _____

Number of Louisiana employees who will be working on this project _____

Location of office from which this account will be serviced: _____

Describe the ownership of your Firm. _____

Are you licensed in the State of Louisiana: _____ YES _____ NO

Louisiana Producer Number: _____ Expiration Date: _____

Name of licensed Principal(s): _____

Have you handled an account within the last 10 years with a total cost of risk in excess of \$5,000,000? _____

Do you have experience in providing producer services similar to those outlined in the

SOQ? _____

Do your commercial lines accounts generate an annual premium volume of at least \$10,000,000? _____

For how many Louisiana Public Entity clients within the last 10 years do you currently provide or have you provided Producer of Record Services? _____

What are the locations of any branch offices/affiliates that will assist in servicing this contract? (list location & affiliate name)

Please provide a narrative addressing the following:

- A. Please describe what technology will the FIRM utilize while servicing the Parish?
 - a. How will this technology help to market the Parish's insurance program?
 - b. How will this technology assist the Parish's Risk Management Department implement, monitor, and administer its property and casualty insurance program?
 - c. How will this technology make the Parish insurance program more efficient?
 - d. How will this technology help reduce the Parish's expenses related to its insurance program?

- B. Please provide the names and positions of each professional to be assigned to the Parish's account, including their knowledge and experience with other public entities. Describe the professional qualifications and education of each team member. Provide two (2) references for each team member.

- C. Provide an explanation of what distinguishes the services the Firm can provide from other Person or Firms, and any additional or unique services your Firm would provide to the Parish.

- D. Describe the method you will use to secure competitive quotes for the Parish's insurance program, including surplus lines relationships and intended usage.

Signature

Date

Title

PLEASE NOTE: Jefferson Parish reserves the right to verify any information provided herein.

ATTACHMENT E
LIST OF PRIOR² OR CURRENT
PUBLIC ENTITY ACCOUNTS

Name of Firm: _____

PUBLIC ENTITY Address	PERIOD HANDLED	CONTACT PERSON Phone Number
--------------------------	----------------	--------------------------------

1) _____

2) _____

3) _____

4) _____

5) _____

6) _____

Signature

Date

Title

To provide additional Accounts, make copies of this page.

PLEASE NOTE: Jefferson Parish reserves the right to verify any information provided herein.

² Within the last 10 years.

ATTACHMENT F
LIST OF ACCOUNTS WITH TOTAL COST OF RISK IN EXCESS OF
\$5,000,000³

Name of Firm: _____

ACCOUNT NAME Address	PERIOD HANDLED Cost of Risk	CONTACT PERSON Phone Number
-------------------------	--------------------------------	--------------------------------

1) _____

2) _____

3) _____

4) _____

5) _____

6) _____

Signature

Date

Title

It is not necessary to list six (6) accounts with total cost of risk in excess of \$5,000,000 to meet the minimum requirements.

PLEASE NOTE: Jefferson Parish reserves the right to verify any information provided herein.

³ Within the last 10 years.

ATTACHMENT G

FEE SCHEDULE

Name of Firm _____

JP Property, Casualty, and Liability Insurance including NFIP coverages:

Please provide a compensation flat fee schedule for the periods indicated below using data outlined in Part 2 Scope of Services, Part 1.4.D, and Attachment B of the SOQ. Please note: flat fee will exclude NFIP commissions; commissions for NFIP will be paid in addition to and separately from the agreed upon flat fee.

TERM	FEE
09/01/2024-25	
09/01/2025-26	
09/01/2026-27	
09/01/2027-28	

If applicable, please disclose any additional fees for technology or technology-related services.

In necessary, do you agree to accept any or all of the annual fees indicated above in monthly payments? _____.

If you do not agree, please indicate your proposed payment scheme:

Signature

Date

Title