

MSGIA Request for Proposal



**Request for Proposal (RFP)
For On-Line Training Application
Hosting and Services**

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I. Objective

The Montana Schools Group Insurance Authority (MSGIA) is requesting proposals from on-line (web based) application and hosting service companies to provide specific training content for K-12 school districts. The content areas are to encompass all operations and aspects of K-12 school districts with risk management, state and federal compliance areas for schools, and claim reduction strategy trainings to assist MSGIA members with their comprehensive training needs related to workers' compensation and property and liability exposure areas.

II. Background

MSGIA, an inter-local governmental entity comprised of K-12 Montana school districts and educational cooperatives, serves only those K-12 public school members and was established in 1989. The purpose of MSGIA is to provide self-insured coverages for the members in the areas of workers' compensation and property and liability coverages.

Currently, MSGIA has approximately 19,100 covered employees in its' Workers' Compensation program with 254 school district members. Our Property and Liability pool has 124 members.

MSGIA provides robust risk management resources to its members to partner with them in managing the risks and exposures present in the K-12 public school arena for the coverage areas offered by the MSGIA.

III. Response Instructions

Please submit **1 paper** copy via us mail (address on next page), in addition to one electronic copy (PDF) sent via email, of your response to this RFP no later than **3 p.m. (Mountain Standard Time) on October 3, 2019**, to sbubb@mtsba.org.

Please provide attachments in the order specified. Additional attachments may be provided as back up information and not directly in response to the question set. Provide your firm's name on each page if possible. Please respond using single-spaced, single sided 8 ½ x 11 paper in no smaller than 11 pt. font.

Proposals shall be signed with an original signature of an individual with the authority to bind the offer to the extent of the proposal.

Any proposal received after the time and date listed above will not be considered. It is the sole responsibility of the Submitting Entity to deliver the proposal to MSGIA on or before the due date.

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IV. Timing - 2019

The following selection schedule has been established:

September 3, 2019	RFP posted on MSGIA website & regional newspaper
September 17, 2019	Last Day for Questions
October 3, 2019, 3:00 p.m. (MDT)	RFP Response Deadline
October 16, 2019	RFP Vendor Selection
November 1, 2019	Begin Implementation Discussions
July 1, 2020	Full Implementation and start of new contract

The date shown above for the award of the contract is subject to change without notice.

V. Contact Information

The primary MSGIA contact person will be Shawn Bubb. He can assist with questions about the process or any background questions.

Physical Address:

Shawn Bubb
MSGIA Director of Insurance Services
863 Great Northern Blvd, Suite 201
Helena, MT 59601
406.457.4418 (direct line)
sbubb@mtsba.org

Mailing Address:

Shawn Bubb
MSGIA
PO Box 7029
Helena, MT 59604

VI. Selection Process

An evaluation committee of our board of directors will review all submitted RFPs and related materials. All qualified submissions received by the deadline will be analyzed according to the criteria outlined in this RFP. After receipt of all proposals and prior to the award, MSGIA may initiate discussions and/or interviews with one or more Submitting Entities should clarification or negotiation be necessary. The evaluation committee will review the sample content of the proposing company, the reporting system functionality, the implementation process flow, the proposed pricing, and consider the information received in the reference checking process. The final award of the contract will be extended once consensus has been reached among members of the evaluation committee.

Any information and/or factors gathered during phone interviews, negotiations, and any reference checks, shall be the sole and exclusive property of MSGIA. MSGIA reserves the right to contact references other than, and/or in addition to, those furnished by the Submitting Entity. MSGIA shall not be responsible or liable in any manner for the risks, costs, or expenses incurred by any Submitting Entity in the preparation of its response to this RFP. Travel to Helena, Montana to discuss technical or contractual aspects of the proposal, or for interviews, oral presentations, and product demonstrations, shall be at the Submitting Entities' expense.

VII. Evaluation Criteria

Specific attention will be paid to:

- Company strength & stability
- The type and quality of content
- K-12 School focus of content and risk management exposure areas
- System Administration functions – for the MSGIA member and MSGIA
- System Reporting functions - for the MSGIA member and MSGIA
- Contract fees
- Implementation and MSGIA member management approach
- Credentials, experience and reputation of the assigned team
- Quality of existing client relationships and references

VIII. Requirements of Proposer

Any Submitting Entity responding to this RFP must have a minimum of 5 years in on-line school district application & hosting training services in order to be considered. All Submitting Entity's services must be web based hosted services and provide redundancies to reduce or eliminate down time for MSGIA member's training needs.

IX. Receipt of Proposals and Public Inspection

All information received in response to this RFP, including copyrighted material, should be considered public information.

If the Submitting Entity submits information in response to this RFP that it believes to be proprietary or trade secret materials, as defined by the provisions of Montana's Uniform Trade Secrets Act, Mont. Code Ann. §§ 30-14-410, et. seq. the Submitting Entity must meet the following requirements:

- (1) The information to be withheld under a claim of confidentiality must be clearly marked and separated from the rest of the proposal;
- (2) The proposal may not contain trade secret matter in the cost or price; and
- (3) The Submitting Entity's explanation of the validity of the trade secret claim must be set forth in an affidavit that is provided by the submitting entity and attached to the completed proposal.

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All responses and other materials submitted in response to this RFP shall be considered the property of MSGIA. MSGIA assumes no obligation and shall incur no liability regarding confidentiality of all or any portion of a response or any other material submitted in response to this RFP unless expressly agreed in writing to protect specifically identified information.

X. Requirements of Proposal

A. Firm Strength and Stability

1. Please provide the full name of your organization, address, telephone, firm website, and mailing address of your main office.

Include an overview of the firm/company including a description of the corporate structure of the firm, year of founding in present form, including the legal form of the organization, the parent company (if applicable), and any affiliated companies. If any change to the firm's corporate structure is anticipated, please also note this.

2. Please indicate the number of years your firm has been performing the requested services of this RFP like those that you seek to provide to MSGIA.

3. Please describe your client base, including types of clients served, the length of time of services and the average total employee count and approximate site locations of your clients.

4. Describe any material litigation, regulatory, or legal proceedings in which your firm or any of the principals are or have been involved over the past five years.

5. Describe the levels of insurance coverage, including the amounts of errors and omission insurance and any other fiduciary professional liability insurance your firm currently has in force.

6. Provide the amount of coverage and which carrier your firm uses to provide its' cyber security coverage. Will your company be able to list the MSGIA as an additional insured on your cyber policy for any liability created or stemming from a cyber event at your organization impacting MSGIA members personal information?

7. What do you believe sets your organization's content and system services apart from the competition?

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8. Describe your firm's experience and capability for providing the requested services specifically to K-12 school district members.

B. Implementation Process and Course Content Materials

1. Comment on your client "implementation philosophy" and processes used for bringing all member employees on-line in your system.
2. Describe your firm's approach to researching, developing and deploying new content on your training platform.
3. Explain how your firm would allow for MSGIA developed content to be deployed via your training platform.
4. Explain how your firm would allow for MSGIA partner content to be deployed via your training platform. The MSGIA purchases specific content related to bus transportation exposures and related regulatory transportation trainings from another vendor and would like to keep all content delivery through one platform for MSGIA members' benefit.
5. How would you assist MSGIA's Risk Management staff in meeting their risk management training responsibilities with our members?
6. Describe the process your system uses to load specific MSGIA member material for viewing and tracking of viewing on your system.
7. Does your system allow for any type of coordination of data management from member claim system feeds to create smart training course suggestions for members based on actual claims history?
8. Please provide three client references applicable to this RFP whom we can contact. Include the contact name, title, address, telephone, e-mail, and the length of time providing services.

C. Service Structure & Accessibility

1. Please provide a full list of the services offered by your firm that would be applicable to this contract.

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2. Provide the location of the office(s) that will serve MSGIA and biographies and credentials of the key service team members assigned to our account.
3. Tell us about the support professionals who would be responsible for this account. Explain how the team dedicated to our account would function.
4. Will our primary service team member be available to meet via telephone at least semi-annually to review our accounts needs and current performance?
5. What is your quality standard for returning telephone calls and/or emails?

D. System Performance and Reporting

1. Comment on your process for providing access to performance reports to MSGIA's members utilization of the course content on your system.
2. Please either be prepared to demo this system functionality or show it through screen shots as part of this written proposal.
3. Explain how your company handles regular system maintenance and what your system availability has been like over the past two years for your clients.

E. Fee Proposal

1. Please describe the fees proposed by your organization for providing the RFP requested services to MSGIA. Fully itemize all fees, if any, for the following:
 - Cost per employee/per MSGIA member
 - Implementation costs, if any
 - Annual hosting fees if not considered in per employee fee
 - Any additional charges for MSGIA member support services

For purposes of your proposal, please consider approximately 19,100 employees with full access to all content courses in your company's offering. Provide pricing by employee as annually our employee count changes.

Thank you for taking the time to respond to MSGIA's request for proposal for on-line training application and hosting services for our members! Your effort is deeply appreciated, and we will respond to all proposals submitted that meet the minimum requirements for this proposal.

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Attachments requested:

ATT 1 – Reference Listings

ATT 2 – Samples of system reports, portal dashboards, etc.

ATT 3 – Firm/Organization Marketing Brochure/Package

ATT 4 – List of and copies of any outside credentials, certifications, memberships, and accolades.

XI. Rejection of Proposals and Cancellation of Award

MSGIA reserves the right to reject any and all proposals. MSGIA also reserves the right to cancel or amend this RFP at any time.

MSGIA reserves the right, without any liability, to cancel the award of any proposal at any time before the execution of the agreement by all parties.

While MSGIA has every intention to award a contract as a result of this RFP, issuance of the RFP in no way constitutes a commitment by MSGIA to award and execute a contract. Upon determination such actions would be in its best interest, MSGIA, in its sole discretion, reserves the right to:

- Cancel or terminate this RFP;
- Reject any or all proposals received in response to this RFP
- Waive any undesirable, inconsequential, or inconsistent provision of this RFP which would not have significant impact on any proposal;
- Not award if it is in the best interest of MSGIA not to proceed with contract execution; or
- If awarded, terminate any contract if MSGIA determines adequate funds are not available.