



Alamance-Burlington School System
Finance Department
1712 Vaughn Rd
Burlington, NC 27217
Phone (336) 570-6060 Fax (336) 570-6084

Statement of Qualifications & Request for Proposals

Commercial Insurance Broker

1. Briefly summarize (in 250 words or less) your corporate structure.
2. At any time in the past 10 years, has your firm or any of its employees been censured, disciplined, reprimanded, suspended, had certifications revoked, or been otherwise penalized for an unethical business practice? If yes, briefly (in 250 words or less) summarize the details.
3. For how many years has your firm been providing insurance brokerage services?
4. How many commercial customers does your firm currently contract with? How many of these are K-12 clients?
5. What is your current account manager to client ratio?
6. What is the average years of industry experience among account managers?

7. Describe in full detail the support you provide during an insurance claim whether it is a property, auto, or workers comp claim.
8. What support would you provide the Alamance-Burlington School System in reducing its workers comp experience mod?
9. What support would you provide the Alamance-Burlington School System in reducing its exposure to general liability claims?
10. In your view what are the key exposures the Alamance-Burlington School System faces?
11. What are foreseeable future risks to the K-12 education industry for which we should prepare?
12. How do you determine at which juncture it is more advantageous to self-insure rather than purchase coverage?
13. How is your commission calculated for property insurance, auto insurance and workers comp policies?
14. How does your firm operate to get its clients the best possible premium?
15. Why is your firm the best choice to provide insurance brokerage services for the Alamance-Burlington School System?

Responses are due by May 31, 2019 at 5:00 pm. They may be mailed to the address below or emailed to jeremy_teetor@abss.k12.nc.us.

Alamance-Burlington School System
Attn: Jeremy Teetor
1712 Vaughn Rd
Burlington, NC 27217