



STATE OF TENNESSEE  
DEPARTMENT OF COMMERCE AND INSURANCE

**REQUEST FOR PROPOSALS # 33501-242004  
AMENDMENT # 3  
FOR THE DEVELOPMENT AND ADMINISTRATION OF  
INSURANCE AGENT LICENSING EXAMINATIONS  
AND ADMINISTRATION OF THE PRE-LICENSE AND  
CONTINUING EDUCATION PROGRAMS**

DATE: JUNE 4, 2024

RFP # 33501-242004 IS AMENDED AS FOLLOWS:

1. This RFP Schedule of Events updates and confirms scheduled RFP dates. Any event, time, or date containing revised or new text is highlighted.

EVENT	TIME (central time zone)	DATE
1. RFP Issued		April 17, 2024
2. Disability Accommodation Request Deadline	2:00 p.m.	April 22, 2024
3. Pre-response Conference	10:00 a.m.	April 25, 2024
4. Notice of Intent to Respond Deadline	2:00 p.m.	April 30, 2024
5. Written "Questions & Comments" Deadline	2:00 p.m.	May 3, 2024
6. State Response to Written "Questions & Comments"		May 17, 2024
7. Amendment 2		May 23, 2024
8. Written "Questions & Comments" Deadline - ROUND 2		May 30, 2024
9. State Response to Written "Questions & Comments" - ROUND 2		June 4, 2024
10. Response Deadline	2:00 p.m.	June 20, 2024
11. State Completion of Technical Response Evaluations		July 8, 2024
12. State Opening & Scoring of Cost Proposals	2:00 p.m.	July 9, 2024
13. Negotiations	4:30 p.m.	July 11-16, 2024
14. State Notice of Intent to Award Released <u>and</u> RFP Files Opened for Public Inspection	2:00 p.m.	July 22, 2024

15. End of Open File Period		July 29, 2024
16. State sends contract to Contractor for signature		July 31, 2024
17. Contractor Signature Deadline	2:00 p.m.	August 2, 2024

**2. State responses to questions and comments in the table below amend and clarify this RFP.**

Any restatement of RFP text in the Question/Comment column shall **NOT** be construed as a change in the actual wording of the RFP document.

RFP SECTION	PAGE #	QUESTION / COMMENT	STATE RESPONSE
	1	As per the Cost Proposal & Scoring Guide (RFP Attachment 6.3) bidders shall indicate the proposed price for goods or services defined in the Scope of Services of the RFP. However, it remains unclear whether bidders should include the \$10 statutory in all exam fees (with the exception of Title and Public Adjuster, where a statutory fee is not assessed) referenced on RFP p. 44. Can the State clarify whether bidders should include or exclude the \$10 fee in the cost proposal?	Respondents should include the \$10 fee in the cost proposed for the following exams: Life Insurance, Accident and Health Insurance, Property Insurance, Casualty Insurance, and Personal Lines.
	2	As per Public Adjuster Rule 0780-1-91-.06(3), the Public Adjuster examination fee is set at \$50 (a statutory fee is not assessed for this exam). Can the State confirm that all bidders must list \$50 on the corresponding line of the cost proposal?	Pursuant to this Amendment's Item 3 below, RFP Attachment 6.3. (Cost Proposal & Scoring Guide) has been revised removing the cost proposal for Public Adjuster examinations.  In addition, pursuant to this Amendment's Item 4 below, Section C.2. of RFP Attachment 6.6. has been revised to clarify that the fee charged per Public Adjuster Exam shall be \$50.00, as set forth in Tenn. Comp. R. & Regs. 0780-1-91-.06(3).

**3. Delete RFP Attachment 6.3. (Cost Proposal & Scoring Guide) in its entirety and replace it with the revised Attachment 6.3. on pages 4-5 of this Amendment.**

**4. Delete Section C.2. of the Pro Forma Contract (RFP Attachment 6.6.) in its entirety and insert the following in its place (any sentence or paragraph containing revised or new text is highlighted):**

C.2. In consideration of the services provided by the Contractor, as set forth in Section A of this Contract, the Contractor shall charge and collect examination fees from each candidate registered for examination and fees for continuing education provider applications and renewals, in accordance with the fee schedule set forth below.

<b>Service Description</b>	<b>Amount (per compensable increment)</b>
Life insurance examination	\$_____ per exam
Life insurance examination (Online Proctored)	\$_____ per exam
Accident and health insurance examination	\$_____ per exam
Accident and health insurance examination (Online Proctored)	\$_____ per exam
Property insurance examination	\$_____ per exam
Property insurance examination (Online Proctored)	\$_____ per exam
Casualty insurance examination	\$_____ per exam
Casualty insurance examination (Online Proctored)	\$_____ per exam
Personal lines examination	\$_____ per exam
Life, accident, and health insurance examination	\$_____ per exam
Property and casualty insurance examination	\$_____ per exam
Life, accident, health, and title insurance examination	\$_____ per exam
Property, casualty, and title insurance examination	\$_____ per exam
Title insurance examination	\$_____ per exam
Public adjuster examination	\$50.00* per exam
Continuing education provider application filing fee	\$500.00**
Continuing education provider renewal application filing fee	\$250.00 per application**

\* Applicable fees specified by Tenn. Comp. R. & Regs. 0780-1-91-.06(3)

\*\* Applicable fees specified by Tenn. Comp. R. & Regs. 0780-1-56-.08(l)

5. **RFP Amendment Effective Date.** The revisions set forth herein shall be effective upon release. All other terms and conditions of this RFP not expressly amended herein shall remain in full force and effect.

**RFP ATTACHMENT 6.3.****COST PROPOSAL & SCORING GUIDE**

**NOTICE: THIS COST PROPOSAL MUST BE COMPLETED EXACTLY AS REQUIRED**

**COST PROPOSAL SCHEDULE—** The Cost Proposal, detailed below, shall indicate the proposed price for goods or services defined in the Scope of Services of the RFP Attachment 6.6., *Pro Forma* Contract and for the entire contract period. The Cost Proposal shall remain valid for at least one hundred twenty (120) days subsequent to the date of the Cost Proposal opening and thereafter in accordance with any contract resulting from this RFP. All monetary amounts shall be in U.S. currency and limited to two (2) places to the right of the decimal point.

**NOTICE:** The Evaluation Factor associated with each cost item is for evaluation purposes only. The evaluation factors do NOT and should NOT be construed as any type of volume guarantee or minimum purchase quantity. The evaluation factors shall NOT create rights, interests, or claims of entitlement in the Respondent.

Notwithstanding the cost items herein, pursuant to the second paragraph of the *Pro Forma* Contract section C.1. (refer to RFP Attachment 6.6.), the State is under no obligation to request work from the Contractor in any specific dollar amounts or to request any work at all from the Contractor during any period of this Contract.

This Cost Proposal must be signed, in the space below, by an individual empowered to bind the Respondent to the provisions of this RFP and any contract awarded pursuant to it. If said individual is not the *President* or *Chief Executive Officer*, this document must attach evidence showing the individual's authority to legally bind the Respondent.

<b>RESPONDENT SIGNATURE:</b>			
<b>PRINTED NAME &amp; TITLE:</b>			
<b>DATE:</b>			
<b>RESPONDENT LEGAL ENTITY NAME:</b>			
Cost Item Description	Proposed Cost	State Use Only	
		Evaluation Factor	Evaluation Cost (cost x factor)
Life insurance examination	\$ / per exam	10,988	
Life insurance examination (Online Proctored)	\$ / per exam	20,826	
Accident and health insurance examination	\$ / per exam	9,342	
Accident and health insurance examination (Online Proctored)	\$ / per exam	15,474	
Property insurance examination	\$ / per exam	4,487	

RESPONDENT LEGAL ENTITY NAME:			
Cost Item Description	Proposed Cost	State Use Only	
		Evaluation Factor	Evaluation Cost (cost x factor)
Property insurance examination (Online Proctored)	\$ / per exam	7,046	
Casualty insurance examination	\$ / per exam	3,844	
Casualty insurance examination (Online Proctored)	\$ / per exam	6,111	
Personal lines examination	\$ / per exam	3,445	
Life, accident, and health insurance examination	\$ / per exam	12,273	
Property and casualty Insurance examination	\$ / per exam	6,663	
Title insurance examination	\$ / per exam	177	
Life, accident, health, and title insurance examination	\$ / per exam	10	
Property, casualty, and title insurance examination	\$ / per exam	10	
<b>EVALUATION COST AMOUNT</b> (sum of evaluation costs above): The Solicitation Coordinator will use this sum and the formula below to calculate the Cost Proposal Score. Numbers rounded to two (2) places to the right of the decimal point will be standard for calculations.			
$\frac{\text{lowest evaluation cost amount from all proposals}}{\text{evaluation cost amount being evaluated}} \times 30$		(maximum section score)	= SCORE:
State Use – Solicitation Coordinator Signature, Printed Name & Date:			