

STATE OF OHIO
DEPARTMENT OF ADMINISTRATIVE SERVICES
GENERAL SERVICES DIVISION
OFFICE OF PROCUREMENT SERVICES
4200 SURFACE ROAD, COLUMBUS, OH 43228-1395

AMENDMENT FOR CHANGE
AMENDMENT NO. 4

TO: DEPARTMENT OF ADMINISTRATIVE SERVICES
FROM: ROBERT BLAIR, DIRECTOR, DEPARTMENT OF ADMINISTRATIVE SERVICES
SUBJECT: COMPETITIVE SEALED PROPOSAL - Property and Casualty Insurance, Broker of Record, for the State of Ohio

Attached are pages 1, 2 and 4 to this contract. Remove these pages from the existing contract and replace with the attached pages on the effective and/or revision date.

This amendment is issued to renew the contract through 06/30/12 and revise pricing to reflect an additional 1% fee reduction for FY12, effective with all orders placed on or after July 1, 2011.

All other prices, terms and conditions remain unchanged.

Questions regarding this Amendment and/or the Requirements Contract may be directed to:

Therese Gallego, CPPB
therese.gallego@das.state.oh.us

This amendment, the main Requirements Contract and any additional amendments thereto are available from the DAS website at the following address:

<http://www.ohio.gov/procure>

Affected Contractor(s):

0000163030
Willis of Ohio, Inc.
312 Walnut Street
Cincinnati, OH 45202



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MANDATORY USE CONTRACT FOR: Property and Casualty Insurance, Broker of Record, for the State of Ohio

CONTRACT NUMBER: CSP902409

EFFECTIVE DATES: 12/12/08 TO 06/30/10
Renewal through 06/30/12

The Department of Administrative Services has accepted Proposals submitted in response to Request for Proposal (RFP) No. CSP902409 that opened on November 14, 2008. The evaluation of the Proposal responses has been completed. The Offeror listed herein has been determined to be the highest ranking Offeror and has been awarded a Contract for the services listed. The respective Proposal response including, Contract Terms & Conditions, any Proposal amendment, special Contract Terms & Conditions, specifications, pricing schedules and any attachments incorporated by reference and accepted by DAS become a part of this Services Contract.

This Requirements Contract is effective beginning and ending on the dates noted above unless, prior to the expiration date, the Contract is renewed, terminated, or cancelled in accordance with the Contract Terms and Conditions.

This Requirements Contract is available to the Department of Administrative Services as applicable.

The agency is eligible to make purchases of the contracted services in any amount and at any time as determined by the agency. The State makes no representation or guarantee that department will purchase the volume of services as advertised in the Request for Proposal.

Questions regarding this and/or the Services Contract may be directed to:

Therese Gallego, CPPB
therese.gallego@das.state.oh.us

This Requirements Contract and any Amendments thereto are available from the DAS Web site at the following address:

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COST SUMMARY FORM

UNSPSC Number: 84131500

Cost must be reflected in a US dollar amount.

Premiums for all insurance products procured on behalf of the State shall be net of broker commissions.

OAKS Number: 14853

Invoices are to be submitted quarterly from the Contractor and must identify the activities performed.	
DESCRIPTION	Not to Exceed Amount
Flat Fee for core services through June 30, 2010:	\$250,000.00
Core services plus optional services: (Optional services must be detailed with an attached description)	Included
Full Service through June 30, 2010: (Fee for core services plus optional services)	\$250,000.00
Flat Fee for core services through June 30, 2011:	\$237,500.00
Core services plus optional services: (Optional services must be detailed with an attached description)	Included
Full Service through June 30, 2011: (Fee for core services plus optional services)	\$237,500.00
*Flat Fee for core services through June 30, 2012:	\$235,000.00
Core services plus optional services: (Optional services must be detailed with an attached description)	Included
*Full Service through June 30, 2012: (Fee for core services plus optional services)	\$235,000.00

The ORM is requesting that broker services be proposed on a fee basis. The Offeror's response must clearly present the Offeror's compensation of fee structure for specified core services along with rates for optional services as available.

The State seeks an all-inclusive cost structure that will allow predictability of fees and accuracy in budget planning. The Offeror's plan of compensation for insurance placement and consulting services shall be described in detail, on a flat annual fee basis. The Offeror shall describe in detail the maximum fee for all services the State may elect to purchase.

Any additional services must be individually priced but Offerors should also provide bundling options for these elective services such that there is (1) a fee for core services, (2) a fee for core services plus additional services recommended by the Offeror for the State creating a mid-level price structure, and (3) a fee for full-service, which would be one fee for the core level services plus all additional services.

The successful broker will be required to disclose in detail all compensation received from any source resulting from the marketing of insurance programs for the State. The proposal shall include a clear statement of the services for which compensation would be in the form of fees paid by the State and to what extent, if any, compensation would rely upon commissions paid by underwriters.

There will be no additional reimbursement for travel or other related expenses not included in the Not to Exceed Costs

* Indicates a additional1% price reduction for FY12.

SUMMARY OF AMENDMENTS

Amendment Number	Revision Date	Description
4	07/01/11	Indicates a renewal of this contract though June 30, 2012. This amendment also indicates an additional 1% price reduction for FY12, effective with all orders issued on or after July 01, 2011.
3	07/01/10	Indicates a renewal of this contract though June 30, 2011. This amendment also indicates a 5% price reduction for FY11 and a change of main company contact, effective with all orders issued on or after July 01, 2010.
2	08/10/09	Change company contacts
1	03/25/09	Change payment terms