



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

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

CONTRACT NUMBER: CSP904612

EFFECTIVE DATES: 7/1/12 TO 6/30/14

\* Renewal through 6/30/17

The Department of Administrative Services has accepted Proposals submitted in response to Request for Proposal (RFP) No. CSP904612 that opened on October 19, 2011. 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 Ohio Department of Administrative Services, Office of Risk Management 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.ohio.gov

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

[www.ohio.gov/procure](http://www.ohio.gov/procure)

\*Indicates renewal effective 07/01/16.

RFP Title: Property and Casualty Insurance, Broker of Record, State of Ohio

CSP904612

UNSPSC CATEGORY CODE: 84131500

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

OAKS ID: 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:	\$ 190,000.00 Annually
Core services plus optional services: (Optional services must be detailed with an attached description)	Included
Full Service: (Fee for core services plus optional services)	\$ 190,000.00 Annually

All costs are in U.S. Dollars.

There will be no additional reimbursement for travel or other related expenses

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.

The State will pay based upon submitted quarterly invoices. The State is prohibited from paying in advance of work being completed. Each invoice must identify the activities performed during the quarter for which payment is being requested. Alternate payment schedules will be considered, provided an explanation for other than quarterly payments is provided

CONTRACTOR INDEX

CONTRACTOR AND TERMS:

163030  
Willis of Ohio Inc.  
775 Yard Street, Suite 200  
Columbus, OH 43212

CONTRACT NO: CSP904612-1 \*

TERMS: Net 10 Days

Remit to Address:

Willis of Ohio Inc.  
775 Yard Street, Suite 200  
Columbus, OH 43212

CONTRACTOR'S CONTACT: John T. Walker

Telephone	(614) 326-4720
Fax	(614) 582-2412
Email	John.T.Walker@willis.com

\*Indicates change, effective 07/01/15.

SUMMARY OF ADMENDMENTS

Amendment Number	Effective Date	Description
4	07/01/16	To renew the contract an additional twelve (12) months, from July 1, 2016 through June 30, 2107.
3	07/01/15	To renew the contract an additional twelve (12) months, from July 1, 2015 through June 30, 2016.
2	07/01/14	To update the Contract Analyst, the Contractor's address and, to renew the contract an additional twelve (12) months, from July 1, 2014 through June 30, 2015.
1	11/07/13	Change payment terms to Net 10 days.