



STATE OF TENNESSEE  
DEPARTMENT OF COMMERCE AND INSURANCE

**REQUEST FOR PROPOSALS # 33501-242004  
AMENDMENT # 1  
FOR THE DEVELOPMENT AND ADMINISTRATION OF  
INSURANCE AGENT LICENSING EXAMINATIONS  
AND ADMINISTRATION OF THE PRE-LICENSE AND  
CONTINUING EDUCATION PROGRAMS**

DATE: MAY 17, 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. Response Deadline	2:00 p.m.	May 30, 2024
8. State Completion of Technical Response Evaluations		June 14, 2024
9. State Opening & Scoring of Cost Proposals	2:00 p.m.	June 17, 2024
10. Negotiations	4:30 p.m.	June 18-21, 2024
11. State Notice of Intent to Award Released <u>and</u> RFP Files Opened for Public Inspection	2:00 p.m.	June 26, 2024
12. End of Open File Period		July 3, 2024
13. State sends contract to Contractor for signature		July 8, 2024
14. Contractor Signature Deadline	2:00 p.m.	July 10, 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	We believe the fees vendors will collect for services provided to testing candidates under this RFP are subject to taxes in certain states. From the perspective of the State, who is responsible for collection and remittance of these taxes to the applicable state tax authorities?	The vendor is responsible for the collection and remittance of taxes to the applicable state tax authorities.
	2	If the state believes the vendor is responsible for the collection and remittance of applicable taxes, how should vendors address those applicable taxes in bidders price proposal and responses?	The prices proposed by the respondent should include/anticipate the cost of applicable taxes and other fees that may be incurred.
General	3	<p>For each item listed below, can you please provide 1) annual volumes for the last two calendar years and 2) the fees associated with each?</p> <ul style="list-style-type: none"> <li>a. Pre-licensing provider applications</li> <li>b. Pre-licensing provider renewals</li> <li>c. Pre-licensing course approvals</li> <li>d. Pre-licensing course renewals</li> <li>e. Continuing education provider applications</li> <li>f. Continuing education provider renewals</li> <li>g. Continuing education course applications</li> <li>h. Continuing education course renewals</li> <li>i. Instructor approvals</li> </ul>	<ul style="list-style-type: none"> <li>a. Pre-licensing provider applications <ul style="list-style-type: none"> <li>- Volume in 2022: 0</li> <li>- Volume in 2023: 0</li> <li>- Fees: \$500</li> </ul> </li> <li>b. Pre-licensing provider renewals are combined with Continuing Education Renewals; not separate. <ul style="list-style-type: none"> <li>- Fees: \$250</li> </ul> </li> <li>c. Pre-licensing course approvals are combined with Continuing Education course approvals; not separate. <ul style="list-style-type: none"> <li>- Fees: \$0.00</li> </ul> </li> <li>d. Pre-licensing course renewals: <ul style="list-style-type: none"> <li>- Volume in 2022: N/A</li> <li>- Volume in 2023: N/A</li> <li>- Fees: \$0.00</li> </ul> </li> <li>e. Continuing Education Provider Applications: <ul style="list-style-type: none"> <li>- Volume in 2022: 6</li> <li>- Volume in 2023: 14</li> <li>- Fees: \$500</li> </ul> </li> <li>f. Continuing Education &amp; Pre-Licensing Provider Renewals: <ul style="list-style-type: none"> <li>- Volume in 2022: 223</li> <li>- Volume in 2023: 218</li> <li>- Fees: \$250</li> </ul> </li> </ul>

			<p>g. Continuing Education &amp; <i>Pre-Licensing</i> Course Applications:  - Volume in 2022: 977  - Volume in 2023: 855  - Fees: \$0.00</p> <p>h. Continuing Education Course Renewals:  - Volume in 2022: N/A  - Volume in 2023: N/A  - Fees: \$0.00</p> <p>i. Instructor Approvals:  - Volume in 2022: N/A  - Volume in 2023: N/A  - Fees: \$0.00</p> <p>Note, in recent years there have been no pre-licensing requirements. However, starting July 1, 2024, there will be pre-licensing requirements for individuals seeking a title insurance license.</p>
RFP Schedule of Events		4	<p>What is the anticipated start date for exam administration to begin with the new contract?</p> <p>The resulting contract is anticipated to begin on August 31, 2024.</p>
Section B. General Qualification & Experience Items, B.15, (b) Business Relationships	22	5	<p>The request is to “provide a listing of the Respondent’s current contracts with business enterprises owned by minorities, women,...” Are you interested in a list of current contracts specifically in Tennessee or across all programs/states?</p> <p>The listing can be in any state, program or project. A long list is not necessary - under five is sufficient.</p>
Section B. General Qualifications & Experience Items, B.15, (c) Estimated Participation	22	6	<p>Can you please provide insight on how estimated DBE participation percentage will be scored? Are there pre-set criteria for scoring based on the percentage? If yes, can you please share that information?</p> <p>There are no pre-set criteria for any scoring. This is only an estimate.</p>
Section C. C12	26	7	<p>This section requires the development and implementation of an online database for the storage and maintenance of Tennessee candidate and license data. Is the vendor required to store the records separately from the State Based Systems?</p> <p>No, the vendor is not required to store the records separately from the State Based Systems.</p>
Pro Forma Contract. A. Scope of Services	37	8	<p>Please provide candidate volume by each exam for 2023, including the combination exams.</p> <p>The candidate volumes by each exam for 2023 are as follows:  - Property Insurance: 2,398  - Casualty Insurance: 2,114  - Life Insurance: 7,758  - Health Insurance: 5,776  - Personal Lines: 1,034  - Public Adjuster: 18</p>

			- Title Insurance: 36  The State only tracks the number of exams taken per exam line and does not have the data on combination exams.
Pro Forma Contract. A. Scope of Services, A.4 and A.5	38-41	9	Please provide exam volume by test center for 2023, along with how many exams were delivered remotely.  In 2023, 11,542 exams were taken in test centers and 7,599 exams were delivered remotely.
Pro Forma Contract A. Scope of Services	37	10	Does the State require the vendor to perform provider course audits? If so, please provide the annual number of audits required of the vendor.  The State does not require the vendor to perform course audits.
Pro Forma Contract. C. Payment Terms and Conditions	43	11	Does the current vendor remit \$10 to the State for each exam delivered? If yes, is the current vendor remitting the \$10 for both test center and online remote proctored administrations?  The current vendor remits \$10.00 to the State for the following examinations (in person and online remote proctored): <ul style="list-style-type: none"> <li>- Life Insurance</li> <li>- Accident and Health Insurance</li> <li>- Property Insurance</li> <li>- Casualty Insurance</li> <li>- Personal Lines</li> </ul> The current vendor does not remit \$10.00 for title insurance and public adjuster examinations.
Pro Forma Contract. C. Payment Terms and Conditions	43	12	Is any portion of the Continuing Education fee paid by the providers to the vendor remitted back to the Department?  No.
Pro Forma Contract. C. Payment Terms and Conditions, C.2.	43	13	In the table, only some of the exam types are identified as being Online Proctored. Is the State open to a vendor administering all exam types both at test centers and online/remotely?  Yes, this is a possibility.
Pro Forma Contract. A. Scope of Services. A.7.	43	14	Please confirm that US-based resources are required for all operational functions such as the call center and remote proctoring.  Yes, this is confirmed.
Pro Forma Contract. A. Scope of Services, A.3 Examination Development	37 & 38	15	In the current exam content outlines, there are Tennessee-specific exam items. Does the State own Tennessee-specific test items that will be shared with the vendor? If yes, how many state-specific items are available per license?  The State does not own any of the Tennessee-Specific test items. These are the property of the current vendor.

3. **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.