RFQ Lobbying Services

<table>
<thead>
<tr>
<th>CONTACT</th>
<th>OPENING DATE AND TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:Ann.ames@biginebraska.org">Ann.ames@biginebraska.org</a></td>
<td>August 7, 2023, 5:00 pm</td>
</tr>
</tbody>
</table>

RETURN ALL QUALIFICATIONS TO: Independent Insurance Agents of Nebraska
8231 Northwoods Drive, Lincoln, NE 68505

This form is part of the specification package and must be signed and returned, along with qualifications documents, by the opening date and time specified.

PLEASE READ CAREFULLY!

SCOPE OF SERVICE

Independent Insurance Agents of Nebraska (IIAN) is issuing this Request for Qualifications (RFQ) for Lobbying services per the enclosed specifications.

QUALIFICATIONS MUST MEET THE FOLLOWING REQUIREMENTS TO BE CONSIDERED VALID. QUALIFICATIONS WILL BE REJECTED IF NOT IN COMPLIANCE WITH THESE REQUIREMENTS.

- Qualifications must be received in IIAN by the date and time indicated above. LATE QUALIFICATIONS WILL BE RETURNED UNOPENED.
- Qualifications must meet all specifications of the RFQ and terms and conditions of this form.
- This form MUST be manually signed below, in ink, and returned by the qualifications opening date and time along with your qualifications and any other requirements as specified in the RFQ in order to be considered for an award.

By signing this Request for Qualifications form, the Proposer guarantees compliance with the provisions stated in this Request for Qualifications, agrees to the Standard Conditions and Terms of Qualification Submission and Acceptance, and certifies that they maintain a drug free workplace environment.

FIRM/OWNER: ____________________________

COMPLETE ADDRESS: ____________________________

TELEPHONE: ____________________________ EMAIL ____________________________

SIGNATURE: ____________________________ DATE ____________________________

PRINTED NAME & TITLE OF SIGNER: ____________________________
The Independent Insurance Agents of Nebraska (hereinafter IIAN) is soliciting qualification submissions for qualified lobbyists to advocate on behalf of IIAN.

Qualifications will be received by IIAN **Monday, August 7, 2023, by 5:00 p.m. CST.**

The Board is requesting qualifications to contract with a legislative liaison beginning November 1, 2023, for a period of two years.

Please send an email indicating your intent to submit qualifications to Ann Ames at ann.ames@biginebraska.org by **5:00 p.m. CST on July 27, 2023.**

All questions with respect to this Request for Qualifications (RFQ) should also be sent to ann.ames@biginebraska.org. The questions and answers will be returned via email to all firms/individuals indicating their intent to submit a qualification. All questions with respect to this RFQ should be submitted by **5:00 p.m. CST on July 27, 2023.**

Respondents must provide their responses in electronic form thru an email to ann.ames@biginebraska.org or on a flash drive (preferred).

IIAN retains the option, at its sole discretion, to extend the qualification due date if compliance with the original due date appears impractical.

The Independent Insurance Agents of Nebraska is a non-profit trade association. Our goal is to provide resources and services that allow Nebraska independent insurance agents the opportunity to grow and reach their potential. We do this through our legislative advocacy, educational programs, marketing resources, and by notifying agents of current events, offering competitive products and resources, partnering with industry vendors, fostering a community with fellow independent agents, and much more. IIAN is a 501(c)(6) non-profit entity and as such, must comply with all state and federal rules with respect to lobbying activities all of which are related to IIAN’s exempt purpose.

IIAN will treat all qualifications as proprietary and confidential information. All qualifications must be valid for a period of 45 days from the submission deadline date. Qualifications must be signed and dated by an authorized official to bind the proposer to its provisions.
1. SCOPE OF SERVICES

1.1

- Assist IIAN in the development and implementation of its mission, key proposals, and policy positions.
- Assist IIAN in bill sponsor selection.
- Develop a plan for off-session activities and coordinate with IIAN.

Tracking and Reporting

- Identify, track and report on state legislation, legislative proposals, and interim studies that may have an impact on IIAN, including a careful review of all introduced bills in the 2024 and 2025 Legislative Sessions.
- Report activities at a minimum through the following:
  - Attendance at least one regular meeting of IIAN’s board while the Legislature is in session to brief the board on potential issues.
  - A written, weekly status report of legislative activities while the Nebraska Legislature is in session.
  - Attendance (either in person or virtually) for IIAN Legislative Committee updates periodically during session.
  - Provide timely notice of legislative issues of immediate concern to IIAN.

Advocacy

- Support IIAN with a presence in the Capitol as needed.
- Serve as a potential contact for legislators and others on behalf of IIAN.
- Work to achieve IIAN’s goals on legislation, issues, or rules promulgation through regular communication with members of the Legislature, legislative staff, and state government officials.
- Advise, coordinate, and assist in the preparation of written and/or in-person testimony to standing Legislative committees and other state agencies.
- Attend and participate in interim hearings, studies, and meetings in connection with issues important to IIAN.

Relationship Building

- Assist in the development of strong relationships with key legislators, state agencies, local governments, and professional and community organizations, consistent with direction provided by IIAN.

Administrative

- Organize state registration, compliance, and reporting as required by state law.

The Independent Insurance Agents of Nebraska prefers that interested vendor(s) offer the fee for the services outlined in this as a firm, fixed fee which includes all expenses including travel.
2. QUALIFICATIONS SELECTION CRITERIA

2.1 An RFQ is sent to firms identified by the Executive Director and IIAN staff and to firms that have previously expressed interest and is posted on the IIAN website.

2.2 Firms shall notify IIAN of their intent to submit. Individual firms that have an intent to submit qualifications can then ask questions, and answers are provided to all firms that have submitted a letter of intent.

2.3 IIAN seeks to retain the services of a legislative liaison to collaborate with us to address matters in which the IIAN needs professional assistance before the Nebraska Legislature, individual State Legislators, the Nebraska Governor and the Policy Research Office, other state agencies, and Federal Legislators representing the State of Nebraska.

2.4 IIAN reserves the right to conduct discussions with any or all firms/individuals who respond to this RFQ for the purpose of clarification and modification. Discussion and negotiation may include, but is not limited to, experience, schedule, pricing, and economic information. IIAN will not be responsible for any costs incurred in the preparation or submission of the qualification.

2.5 IIAN reserves the right to reject any and all qualifications, wholly or in part, to waive any technicalities, informalities, or irregularities in any qualifications which do not materially affect the integrity or effectiveness of the competitive qualification process, and, unless otherwise specified by the proposer in their qualification, to accept any item or group of items in the qualification.

2.6 IIAN further reserves the right to analyze qualifications in detail and to award a contract which it, in the exercise of reasonable discretion, believes to be in its best interest.

2.7 Applicants are encouraged to limit their submissions to a maximum of ten pages in length (excluding cover letter) and in such a way as to follow the general evaluation criteria listed below. Information obtained from the RFQ and from any other relevant source may be used in the evaluation and selection process.

a. **Cover letter** (1-page max) containing at a minimum:
   Company name, contact name, address, phone number, and email address.

b. **General Information** including:
   Description of company, legal name of organization and state of organization, list of applicable Nebraska licenses, if applicable.
c. **Approach to lobbying on behalf of non-profit organizations** (30 points)
   - Describe your firm’s approach to lobbying, network development, legislative strategy, governmental relations, advocacy, legislative monitoring and analysis, and public policy consultation.

d. **Team Experience and Qualifications** (35 points)
   - Describe each team member’s position within the firm.
   - List principal-in-charge of agreement.
   - Provide biographical information for each team member, list education and training experience of team members as an appendix to the RFQ.\(^1\)

e. **Relevant Firm Experience** (25 points)
   List at least three clients for whom you have represented within the past five years and an example of a success achieved with them. Include the following:
   - Client name
   - Contact name
   - Email address
   - Phone number

   Also provide a complete list of current clients and those served within the preceding twelve months of the submission date and identify any potential conflicts of interest that may exist in providing services to the Board.

f. **Other factors** (10 points)
   Please provide proof of registration with the Clerk of the Legislature and a proposed fee schedule for legislative liaison services.

2.8 After reviewing materials submitted and completing an evaluation process, IIAN will develop a short list of candidates. Interviews of these candidates will be conducted August 14 & 15, 2023 between the hours of 1pm and 4pm. Candidates will be given a specific time for their interview upon their selection.

---

\(^1\) Resumes will not count towards the five-to-ten-page limit on the submission.
ADDENDUM TO AGREEMENT

The following terms and conditions are hereby incorporated into the Agreement between your Company (“Company”) and IIAN for services provided to the IIAN. The terms and conditions in this Addendum are hereby incorporated into the Agreement as if fully set forth therein. All other terms and conditions of the Agreement not inconsistent with this Addendum remain unchanged and in full force and effect.

Nondiscrimination
In accordance with the, applicable law and IIAN policy, Company agrees that neither it nor any of its lower tiered subcontractors, if any, shall discriminate against any employee or applicant for employment to be employed in the performance of this Agreement with respect to hire, tenure, terms, conditions, or privileges of employment because of the age, race, national origin, color, religion, sex, sexual orientation, gender identity, transgender status, marital status, disability or veteran status of the employee or applicant, or any other basis prohibited by applicable federal, state or local law.

E-Verification
Pursuant to Neb.Rev.Stat. §§4-108 through 114, Company is required, and hereby agrees, to use a federal immigration verification system to determine the work eligibility status of new employees physically performing services within the State of Nebraska. The company is further required, and hereby agrees, to require that all subcontractors, if any, use a federal immigration verification system to determine the work eligibility status of new employees physically performing services within the State of Nebraska. Federal immigration verification system means the electronic verification of the work authorization program of the Illegal Immigration Reform and Immigrant Responsibility Act of 1996, 8 U.S.C. 1324a, known as the E-Verify Program, or an equivalent federal program designated by the United States Department of Homeland Security or other federal agency authorized to verify the work eligibility status of a newly hired employee pursuant to the Immigration Reform and Control Act of 1986.

Classification of Workers
Company, and all lower-tiered subcontractors under Company if any, shall properly classify all workers as either employees of Company or lower-tiered subcontractors, if any, or as independent contractors according to applicable law, and shall treat them accordingly for purposes of workers’ compensation insurance coverage, unemployment taxes, social security taxes, income tax withholding and all other payments or benefits incident to or affected by such status.

Company, and all lower-tiered subcontractors, if any, utilizing the services of workers who are properly and according to applicable law not classified as employees under this section shall provide written notice to said workers of their status as independent contractors. Said notice shall include a provision advising said workers that they are not eligible for workers’ compensation insurance coverage, unemployment insurance, social security tax withholding, income tax withholding and all other payments or benefits incident to or affected by such status, from Company or IIAN. The company shall provide certification of compliance with this section to the IIAN upon request.

Failure by Company, or any lower-tiered subcontractor engaged by Company, if any, to fully comply with the terms of this provision shall be considered and treated by IIAN as a material breach of this Agreement.

_________________________________________  __________________________
COMPANY                                      Date

_________________________________________
SIGNATURE

SIGNATOR PRINTED NAME AND TITLE