



**Insurance Program Administrator**  
**REQUEST FOR PROPOSAL**  
**October 19, 2020**

**Submissions Due:** Friday, November 27, 2020

The University of Cincinnati Alumni Association is soliciting proposals for an affinity partner to market, underwrite and administer an affinity insurance program as noted below. This program is intended to be offered to all 315,000 UC alumni.

**Insurance plans available for bid include:**

Automobile Insurance  
Homeowners Insurance  
Renters Insurance  
Condo and Secondary Home Insurance  
Boat/Vessel Insurance  
Recreational Vehicle Insurance  
Short-term, Comprehensive, Major Medical Insurance  
Discount and Network Plan  
Renewable Major Medical Insurance  
Dental Insurance  
Disability Income Insurance  
Long Term Care Insurance  
Medicare Supplemental Insurance  
Catastrophic Major Medical Insurance  
Hospital Indemnity Insurance  
Travel Health Insurance  
Pet Health Insurance  
Group Travel Plan  
Group Term Life Insurance  
Accidental Death & Dismemberment Insurance  
Identification Recovery Services  
Travel Accident Product

**The University of Cincinnati Alumni Association plans to adhere to the following schedule:**

Issuance of RFP	October 19, 2020
RFP responses due	By November 27, 2020
Provider selected	By December 11, 2020
Contract completed	By January 15, 2021
Program start date	February 15 – March 1, 2021

Please ensure that your proposal addresses the questions or issues raised in this request.

**PURPOSE**

In sponsoring an affinity insurance program, the UC Alumni Association has the following expectations for this affinity partnership:

- Develop and maintain positive relationships with the largest possible number of UC alumni;
- Uphold and enhance the image of UCAA through the quality of the marketing methods, services and materials utilized in the program;
- Provide a quality insurance program that is appealing to various segments of UC alumni;
- Market the program through the most effective methods and techniques available and provide top quality administration and customer service to all alumni participants in the program;
- Generate revenue for the UC Alumni Association;
- All costs including administration and marketing to be borne by the administrator, not by UCAA;
- All UCAA data to be handled via SFTP third-party arrangement.
- Enter an initial contract period for three (3) years, all programs in agreement concluding by March 1, 2024; or initial contract period for five (5) years, with all programs in agreement concluding by March 1, 2026.

## **BACKGROUND**

The University of Cincinnati Alumni Association (UCAA) represents the university's 315,000 living alumni. The UCAA supports the University of Cincinnati's aspirations through engagement. The UCAA collaborates with colleges and units of the University, as well as alumni networks and constituents, to maximize their support of the University by developing productive and lifelong relationships with our alumni, friends, colleagues and current students. The University of Cincinnati has been named "Among the top tier of the Best National Universities," according to U.S. News & World Report, and Reuters recently named UC among the world's top 100 most-innovative universities.

## **ROLES OF THE ALUMNI ASSOCIATION & INSURANCE PARTNER**

The UC Alumni Association will endorse the selected insurance programs; grant a license to use the association's name, logo and mailing lists; approve specific insurance products; review mailings and other promotional materials; and supply contact information for specific mailings. Our direct communication with alumni regarding the insurance program should be limited to that which is necessary to maintain positive alumni engagement.

We expect our affinity partner to negotiate with carriers/underwriters (carriers must be approved by the UCAA); to handle billings, collections, claims processing and payment; to assume all financial responsibility for all aspects of the program (including, but not limited to, all marketing and administrative costs); to develop and produce all marketing materials; to provide periodic reports on each sponsored program; to protect the confidentiality of the association's mailing lists, ensuring that no unauthorized use of such lists will occur; and to provide all necessary customer service in a manner that reflects favorably upon the alumni association and the University of Cincinnati.

*Your proposal should expressly affirm your understanding and acceptance of these roles, specifically with regard to assumption of all financial responsibility for all aspects of the insurance program.*

## YOUR COMPANY

Brief Overview of Your Organization	
List Products/Company who underwrites product (with parent company name) and AM Best or other rating for that company.	
List of states and products where coverage is not offered or restricted.	
Compensation per product to the alumni association	
Annual guarantee to the UC Alumni Association	
Other compensation and description	

Estimated annual compensation for the duration of the contract, with a brief explanation of how numbers were derived	
Discounts for UC Alumni by product	
Your planned marketing activities	
What you expect from the UCAA regarding marketing	
Proposed Term of Agreement	
Other benefits to the UCAA from this relationship	
List 3 References (other alumni association partners)	
Summary of experience in affinity/association group programs	
Type and frequency of reports	

## **MARKETING AND PROMOTION**

Creative and professional marketing is essential to the success of any program. Please describe your typical alumni association marketing campaign. Please include comments related to the following areas:

1. Your understanding of the alumni marketplace, including any market research you have knowledge of
2. Your marketing department's achievements, including specific response rates
3. Internal marketing capabilities and names of outside marketing/graphic design consultants
4. How marketing campaigns are planned, tracked, analyzed and reported
5. Your planned marketing approach for products endorsed by the University of Cincinnati Alumni Association, including budgets
6. New approaches or other trends or techniques to be used in promoting our programs
7. Views on the desirability and/or necessity of telemarketing

## **CONTRACTUAL/FINANCIAL ARRANGEMENT**

Please indicate, in detail, how the UC Alumni Association would be compensated for endorsing this program. Please provide a three- and/or five- year projection, factoring in planned marketing programs and projected response rates, for each program.

Please comment on the following:

1. Are you interested in entering a three- or five- year agreement? Does contract length (three- or five-year term) impact compensation structure?
2. Will you guarantee a specific level of income for your affinity insurance program? What is that annual guarantee?
3. Your company's compensation structure, including administrative and/or marketing fees and commissions.
4. Would the program be in a trust with other alumni associations, or would it stand alone?

5. What contracts and other documents would be involved (e.g. trust, administration, licensing/marketing agreements). Please provide sample copies, including termination provisions and ownership of records.

The University of Cincinnati Alumni Association (UCAA) reserves the right to reject any and all proposals, in whole or in part, for any or no reason, and/or to enter into negotiations with any third party to provide the program described in this RFP. Furthermore, this RFP may be withdrawn or cancelled by the UCAA at any time at no cost to the UCAA and with no obligation upon the UCAA.

Please note, if your company feels there is additional information that was not requested by the University of Cincinnati Alumni Association but is relevant to your proposal, feel free to also include that information in your proposal. Thank you for your interest in the UC Alumni Association's insurance program.

**Proposals must be received no later than Friday, November 27, 2020.** Please submit your proposal electronically, and if possible, with three (3) printed copies to:

<p><b>ELECTRONIC:</b> <a href="mailto:heather.pena@uc.edu">heather.pena@uc.edu</a> &amp; <a href="mailto:alumni@uc.edu">alumni@uc.edu</a></p>
<p><b>PRINT:</b> UC Alumni Association &amp; Foundation Attn: Heather Peña, UCAA COO University Hall, Suite 100 51 Goodman Dr. Cincinnati, OH 45219-2736</p>

If you have questions or would like additional information, please contact Heather Peña at 513-556-4457 or via email at [heather.pena@uc.edu](mailto:heather.pena@uc.edu).

To learn more about the UC Alumni Association, visit [alumni.uc.edu](http://alumni.uc.edu).