



401 N Canyon City Blvd Canyon City, OR 97820-6111

Phone: (541) 575-1280 FAX: (541) 575-3614

**REQUEST FOR PROPOSALS:
INSURANCE BROKER**

INTRODUCTION AND PURPOSE

Grant School District 3 (GSD3) is a K-12 public school district in John Day Oregon. GSD3 is a member of PACE insurance pool.

GSD3 is soliciting Requests for Proposals for Insurance Agent of Record services for the GSD3's risk management program consisting of property, casualty, liability, auto, as well as other risk management services.

MINIMUM QUALIFICATION

The minimum qualifications for the Insurance Broker Services contract are as show below. Applicants not meeting these minimum requirements will not be evaluated nor considered for this contract.

1. Be licensed by the Insurance Commissioner of the State of Oregon;
2. Have relevant experience with public sector accounts of similar size and scope of services; and
3. The Insurance Agent assigned to the GSD3 must have a minimum of ten years of active experience in the public sector in insurance and risk management fields.

SCOPE OF WORK

GSD3 primary importance on developing and maintaining a quality risk management program with corresponding insurance coverage that thoroughly responds to the risks and liabilities faced by GSD3 in its operation. GSD3 is seeking written proposals from a brokerage firm and representative broker(s) to provide insurance broker services that include but are not limited to insurance placement and servicing, risk exposure analysis, as well as general insurance advisory services and claims assistance.

The selected firm and representative broker(s) will work directly with GSD3 on insurance coverages, renewals, and claims. GSD3 is not only seeking an insurance broker, but also an advisor and trusted ally in the insurance industry.

The applicant should be able to provide a range of services including but not limited to the following:

- Evaluate GSD3's existing insurance program, and as necessary recommend changes to terms, conditions, or coverage limits to ensure the program is affordable and adequately protects GSD3
- Evaluate GSD3's existing insurance program and identify any applicable market trends or exposure trends that GSD3 should be aware of



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- Evaluate GSD3's participation in applicable insurance pools and cost sharing programs for property, casualty and workers compensation
- Assist with the claim submission and handling process
- Serve as the intermediary between GSD3 and the provider when there is a reasonable coverage dispute
- Provide premium estimates upon request
- Negotiate with underwriters on behalf of GSD3 and obtain insurance coverage that best meets GSD3's needs and requirements at the best cost, while also advising on the carrier's services, claim handling process, etc.
- Bind insurance coverage on the exact dates needed by GSD3
- Respond to all insurance related questions and request for advice from the GSD3 in a timely manner
- Assist the GSD3 Superintendent to coordinate inspection, audit, or other Carrier requests
- Provide legal updates and provide guidance on recommended coverages in order to maintain compliance with Federal and State laws and funder regulations as requested by GSD3.

PROPOSAL FORM AND CONTENT

The bidder's proposal must provide a detailed response and supporting documentation, where requested, to each of the following areas:

1. Cover Page

- a. All proposals must include a cover letter addressed to GSD3 and signed by a duly constituted official legally authorized to bind the applicant to both its proposal and cost schedule. The cover letter must include name, address, and telephone number of the proposer submitting the proposal and name, title, address, telephone number, and email address of the person, or persons to contact who are authorized to represent the proposer and to whom correspondence should be directed.



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2. Experience and Qualifications:

- a. List the key personnel and qualifications relative to this RFP; including but not limited to a description of education, certificates or licenses, professional background, experience, skills, expertise and training.
- b. Describe your Agency's qualifications and how many years the Agency has been in business.

3. Services & Support

- a. What special services or support will you provide to GSD3?
- b. How would you approach developing and implementing a risk management program that includes proposals for optional and alternative ideas that will reduce GSD3's risk and/or reduce premium costs yet maintain broad coverage?
- c. How would you stay abreast of local issues concerning GSD3?
- d. Describe your agency's culture?
- e. Provide a description of how your agency's culture impacts the services you provide.
- f. Why do you want our book of business?

4. Additional Services:

- a. Provide descriptions of any other services the Agent would propose to include within the base cost of the proposal.

5. References:

- a. Provide at least 3 relevant clients whom the Proposer is currently or has previously provided Risk Management and Insurance Broker Consulting Services, within the last three (3) years. Provide government contact name, phone number, and email address. Oregon references are preferred. GSD3 reserves the right to explore the background, previous experience, training, financial affairs or related matters of any firm of individual under consideration for this contract.

6. Community Involvement:

- a. A discussion please describe the proposer's use of local resources, availability to meet in person and/or their community involvement.



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EVALUATION CRITERIA AND SCORING

Proposal Minimum Qualifications

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2. Have relevant experience with public sector accounts of similar size and scope of services;
3. The Agent assigned to GSD3 must have a minimum of ten years of active experience in the public sector in insurance and risk management fields.

Evaluation Criteria and Scoring

Each proposal will be judged on its completeness and quality of its content. The evaluation process will begin with an analysis of each proposal using the evaluation criteria and weighting identified below.

- Experience and Qualifications – 40%
- Service & Support - 35%
- References – 15%
- Community Involvement – 10%



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SUBMISSION OF PROPOSALS AND CLOSING TIME

Please submit proposals to: **Grant School District 3
401 N Canyon City Blvd
Canyon City, OR 97820-6111**

Email: markwitty@grantesd.com

Proposals are due by: **March 31st, 2025
4:00pm – Pacific Standard Time**

- Proposals must be submitted via email by the date and time specified above. Bidders are permitted, but not required to submit hard copy proposals in addition to an electronic submission.
- GSD3 encourages inquiries concerning this RFP. All questions pertaining to this RFP must be made via email to markwitty@grantesd.org. Questions are due by 9:00 AM PST, March 21st, 2025

PROPOSED TIMELINE

GSD3 intends to follow the below timeline for review and award of this solicitation:

Questions Due:	March 21, 2025 9:00 AM (PST)
Deadline for Submittal:	March 31, 2025 4:00 PM (PST)
Review of Proposals:	April 1-4, 2025
Interviews or Additional Questions Conducted (if considered necessary):	April 8&9, 2025
Insurance Broker Selected:	April 17, 2025

*Dates are subject to change at the discretion of GSD3



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SOLICITATION TERMS

1. Agreement

Subject to availability of funding, GSD3 intends to issue an exclusive cost reimbursable type agreement for a base period of up to three (3) years with the option to extend to the successful bidder from this procurement process. GSD3 reserves the right to issue one or more awards as a result of this RFP.

2. Discretion

GSD3 may, at its sole discretion and after the evaluation process, choose not to issue any agreement as a result of this process. GSD3 may also, at its sole discretion, choose to issue as many or as few agreements as deemed necessary to meet GSD3's business needs.

4. Proposal Costs

There is no reimbursement for costs associated with preparing or submission of proposals in response to this RFP or costs associated with possible award negotiation.



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