

**MASTER AGREEMENT #RFP 012125****CATEGORY: Risk Management, Employee Benefits, and Insurance Consulting Services****SUPPLIER: Acrisure, LLC**

This Master Agreement (Agreement) is between Sourcewell, a Minnesota service cooperative located at 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 (Sourcewell) and Acrisure, LLC, 100 Ottawa Avenue SW, Grand Rapids, MI 49503 (Supplier).

Sourcewell is a local government and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) offering a Cooperative Purchasing Program to eligible participating government entities.

Under this Master Agreement entered with Sourcewell, Supplier will provide Included Solutions to Participating Entities through Sourcewell's Cooperative Purchasing Program.

**Article 1:
General Terms**

The General Terms in this Article 1 control the operation of this Master Agreement between Sourcewell and Supplier and apply to all transactions entered by Supplier and Participating Entities. Subsequent Articles to this Master Agreement control the rights and obligations directly between Sourcewell and Supplier (Article 2), and between Supplier and Participating Entity (Article 3), respectively. These Article 1 General Terms control over any conflicting terms. Where this Master Agreement is silent on any subject, Participating Entity and Supplier retain the ability to negotiate mutually acceptable terms.

- 1) **Purpose.** Pursuant to Minnesota law, the Sourcewell Board of Directors has authorized a Cooperative Purchasing Program designed to provide Participating Entities with access to competitively awarded cooperative purchasing agreements. To facilitate the Program, Sourcewell has awarded Supplier this cooperative purchasing Master Agreement following a competitive procurement process intended to meet compliance standards in accordance with Minnesota law and the requirements contained herein.
- 2) **Intent.** The intent of this Master Agreement is to define the roles of Sourcewell, Supplier, and Participating Entity as it relates to Sourcewell's Cooperative Purchasing Program.
- 3) **Participating Entity Access.** Sourcewell's Cooperative Purchasing Program Master Agreements are available to eligible public agencies (Participating Entities). A Participating Entity's authority to access Sourcewell's Cooperative Purchasing Program is determined through the laws of its respective jurisdiction.
- 4) **Supplier Access.** The Included Solutions offered under this Agreement may be made available to any Participating Entity. Supplier understands that a Participating Entity's use of this Agreement is at the Participating Entity's sole convenience. Supplier will educate its sales and service forces about

Sourcewell eligibility requirements and required documentation. Supplier will be responsible for ensuring sales are with Participating Entities.

- 5) **Term.** This Agreement is effective upon the date of the final signature below. The term of this Agreement is four (4) years from the effective date. The Agreement expires at 11:59 P.M. Central Time on February 21, 2029, unless it is cancelled or extended as defined in this Agreement.
 - a) **Extensions.** Sourcewell and Supplier may agree to up to three (3) additional one-year extensions beyond the original four-year term. The total possible length of this Agreement will be seven (7) years from the effective date.
 - b) **Exceptional Circumstances.** Sourcewell retains the right to consider additional extensions as required under exceptional circumstances.
- 6) **Survival of Terms.** Notwithstanding the termination of this Agreement, the obligations of this Agreement will continue through the performance period of any transaction entered between Supplier and any Participating Entity before the termination date.
- 7) **Scope.** Supplier is awarded a Master Agreement to provide the solutions identified in RFP #012125 to Participating Entities. In Scope solutions include:
 - a. Insurance Policy Placement along with solicitations;
 - b. Comprehensive Risk Analysis;
 - c. Claims Prevention and Mitigation;
 - d. Incident Response and Recovery;
 - e. Worker's Compensation Safety Programs;
 - f. Regulatory Compliance and Governance;
 - g. Technology and Data Analytics Integration; and
 - h. Strategic Risk Advisory Services.

In the following areas of the United States:

- a. Northeast which includes Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, and Vermont;
 - b. Midwest which includes Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin;
 - c. South which includes Alabama, Arkansas, Delaware, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, Washington, D.C., and West Virginia; or
 - d. West which includes Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, and Wyoming.
- 8) **Included Solutions.** Supplier's Proposal to the above referenced RFP is incorporated into this Master Agreement. Only those Solutions included within Supplier's Proposal and within Scope (Included Solutions) are included within the Agreement and may be offered to Participating Entities.
 - 9) **Indefinite Quantity.** This Master Agreement defines an indefinite quantity of sales to eligible Participating Entities.

10) **Pricing.** Pricing information (including Pricing and Delivery and Pricing Offered tables) for all Included Solutions within Supplier's Proposal is incorporated into this Master Agreement.

11) **Not to Exceed Pricing.** Suppliers may not exceed the prices listed in the current Pricing List on file with Sourcwell when offering Included Solutions to Participating Entities. Participating Entities may request adjustments to pricing directly from Supplier during the negotiation and execution of any transaction.

12) **Open Market.** Supplier's open market pricing process is included within its Proposal.

13) Supplier Representations:

i) **Compliance.** Supplier represents and warrants it will provide all Included Solutions under this Agreement in full compliance with applicable federal, state, and local laws and regulations.

ii) **Licenses.** As applicable, Supplier will maintain a valid status on all required federal, state, and local licenses, bonds, and permits required for the operation of Supplier's business with Participating Entities. Participating Entities may request all relevant documentation directly from Supplier.

iii) **Supplier Warrants.** Supplier warrants that to the best of Supplier's knowledge, all Included Solutions furnished under this Agreement are free from liens and encumbrances, and are free from defects in design, materials, and workmanship. In addition, Supplier warrants the Solutions are suitable for and will perform in accordance with the ordinary use for which they are intended.

14) **Bankruptcy Notices.** Supplier certifies and warrants it is not currently in a bankruptcy proceeding. Supplier has disclosed all current and completed bankruptcy proceedings within the past seven years within its Proposal. Supplier must provide notice in writing to Sourcwell if it enters a bankruptcy proceeding at any time during the term of this Agreement.

15) **Debarment and Suspension.** Supplier certifies and warrants to the best of Supplier's knowledge that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota, the United States federal government, or any Participating Entity. Supplier certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this Agreement. Supplier further warrants that (to the extent not prohibited by law or regulation) it will provide prompt written notice to Sourcwell if this certification changes at any time during the term of this Agreement.

16) **Provisions for non-United States federal entity procurements under United States federal awards or other awards (Appendix II to 2 C.F.R § 200).** Participating Entities that use United States federal grant or other federal funding to purchase solutions from this Agreement may be subject to additional requirements including the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 C.F.R. § 200. Participating Entities may have additional requirements based on specific funding source terms or

conditions. Within this Section, all references to “federal” should be interpreted to mean the United States federal government. The following list applies when a Participating Entity accesses Supplier’s Included Solutions with United States federal funds.

- i) **EQUAL EMPLOYMENT OPPORTUNITY.** Except as otherwise provided under 41 C.F.R. § 60, all agreements that meet the definition of “federally assisted construction contract” in 41 C.F.R. § 60-1.3 must include the equal opportunity clause provided under 41 C.F.R. § 60-1.4(b), in accordance with Executive Order 11246, “Equal Employment Opportunity” (30 FR 12319, 12935, 3 C.F.R. §, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, “Amending Executive Order 11246 Relating to Equal Employment Opportunity,” and implementing regulations at 41 C.F.R. § 60, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.” The equal opportunity clause is incorporated herein by reference.

- ii) **DAVIS-BACON ACT, AS AMENDED (40 U.S.C. § 3141-3148).** When required by federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. § 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 C.F.R. § 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-federal entity must report all suspected or reported violations to the federal awarding agency. The contracts must also include a provision for compliance with the Copeland “Anti-Kickback” Act (40 U.S.C. § 3145), as supplemented by Department of Labor regulations (29 C.F.R. § 3, “Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-federal entity must report all suspected or reported violations to the federal awarding agency. Supplier must comply with all applicable Davis-Bacon Act provisions.

- iii) **CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. § 3701-3708).** Where applicable, all contracts awarded by the non-federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. §§ 3702 and 3704, as supplemented by Department of Labor regulations (29 C.F.R. § 5). Under 40 U.S.C. § 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. § 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies, materials, or articles ordinarily available on the open market, or

contracts for transportation or transmission of intelligence. This provision is hereby incorporated by reference into this Agreement. Supplier certifies that during the term of an award for all Agreements by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

iv) **RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT.** If the federal award meets the definition of “funding agreement” under 37 C.F.R. § 401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 C.F.R. § 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency. Supplier certifies that during the term of an award for all Agreements by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

v) **CLEAN AIR ACT (42 U.S.C. § 7401-7671Q.) AND THE FEDERAL WATER POLLUTION CONTROL ACT (33 U.S.C. § 1251-1387).** Contracts and subgrants of amounts in excess of \$150,000 require the non-federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. § 7401- 7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. § 1251- 1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA). Supplier certifies that during the term of this Agreement it will comply with applicable requirements as referenced above.

vi) **DEBARMENT AND SUSPENSION (EXECUTIVE ORDERS 12549 AND 12689).** A contract award (see 2 C.F.R. § 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 C.F.R. § 180 that implement Executive Orders 12549 (3 C.F.R. § 1986 Comp., p. 189) and 12689 (3 C.F.R. § 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. Supplier certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency.

vii) **BYRD ANTI-LOBBYING AMENDMENT, AS AMENDED (31 U.S.C. § 1352).** Suppliers must file any required certifications. Suppliers must not have used federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Suppliers must disclose any lobbying with non-federal funds that takes place in connection with obtaining any federal award. Such disclosures are forwarded from tier to tier up to the non-federal award. Suppliers must file all certifications and disclosures required by, and otherwise comply with, the Byrd Anti-Lobbying Amendment (31 U.S.C. § 1352).

viii) **RECORD RETENTION REQUIREMENTS.** To the extent applicable, Supplier must comply with the record retention requirements detailed in 2 C.F.R. § 200.333. The Supplier further

certifies that it will retain all records as required by 2 C.F.R. § 200.333 for a period of 3 years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

ix) **ENERGY POLICY AND CONSERVATION ACT COMPLIANCE.** To the extent applicable, Supplier must comply with the mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act.

x) **BUY AMERICAN PROVISIONS COMPLIANCE.** To the extent applicable, Supplier must comply with all applicable provisions of the Buy American Act. Purchases made in accordance with the Buy American Act must follow the applicable procurement rules calling for free and open competition.

xi) **ACCESS TO RECORDS (2 C.F.R. § 200.336).** Supplier agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and records of Supplier that are directly pertinent to Supplier's discharge of its obligations under this Agreement for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to Supplier's personnel for the purpose of interview and discussion relating to such documents.

xii) **PROCUREMENT OF RECOVERED MATERIALS (2 C.F.R. § 200.322).** A non-federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 C.F.R. § 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

xiii) **FEDERAL SEAL(S), LOGOS, AND FLAGS.** The Supplier cannot use the seal(s), logos, crests, or reproductions of flags or likenesses of Federal agency officials without specific pre-approval.

xiv) **NO OBLIGATION BY FEDERAL GOVERNMENT.** The U.S. federal government is not a party to this Agreement or any purchase by a Participating Entity and is not subject to any obligations or liabilities to the Participating Entity, Supplier, or any other party pertaining to any matter resulting from the Agreement or any purchase by an authorized user.

xv) **PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS OR RELATED ACTS.** The Contractor acknowledges that 31 U.S.C. § 38 (Administrative Remedies for False Claims and Statements) applies to the Supplier's actions pertaining to this Agreement or any purchase by a Participating Entity.

xvi) **FEDERAL DEBT.** The Supplier certifies that it is non-delinquent in its repayment of any federal debt. Examples of relevant debt include delinquent payroll and other taxes, audit disallowance, and benefit overpayments.

xvii) **CONFLICTS OF INTEREST.** The Supplier must notify the U.S. Office of General Services, Sourcewell, and Participating Entity as soon as possible if this Agreement or any aspect related to the anticipated work under this Agreement raises an actual or potential conflict of interest (as described in 2 C.F.R. Part 200). The Supplier must explain the actual or potential conflict in writing in sufficient detail so that the U.S. Office of General Services, Sourcewell, and Participating Entity are able to assess the actual or potential conflict; and provide any additional information as necessary or requested.

xviii) **U.S. EXECUTIVE ORDER 13224.** The Supplier, and its subcontractors, must comply with U.S. Executive Order 13224 and U.S. Laws that prohibit transactions with and provision of resources and support to individuals and organizations associated with terrorism.

xix) **PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT.** To the extent applicable, Supplier certifies that during the term of this Agreement it will comply with applicable requirements of 2 C.F.R. § 200.216.

xx) **DOMESTIC PREFERENCES FOR PROCUREMENTS.** To the extent applicable, Supplier certifies that during the term of this Agreement, Supplier will comply with applicable requirements of 2 C.F.R. § 200.322.

Article 2: Sourcewell and Supplier Obligations

The Terms in this Article 2 relate specifically to Sourcewell and its administration of this Master Agreement with Supplier and Supplier's obligations thereunder.

- 1) **Authorized Sellers.** Supplier must provide Sourcewell a current means to validate or authenticate Supplier's authorized dealers, distributors, or resellers which may complete transactions of Included Solutions offered under this Agreement. Sourcewell may request updated information in its discretion, and Supplier agrees to provide requested information within a reasonable time.

The following affiliates and subsidiaries are included in this Master Agreement:

Acrisure, LLC Subsidiary or Affiliate	Tax ID No.
Acrisure New England Partners Insurance Services, LLC	92-3710839
Acrisure Mid-Atlantic Partners Insurance Services, LLC	92-3652116
Acrisure NJ Partners Insurance Services, LLC	92-1417552
Acrisure Great Lakes Partners Insurance Services, LLC	92-3606439
Acrisure Texas Risk Advisors & Insurance Services, LLC	88-4398914
Acrisure Southeast Partners Insurance Services, LLC	92-3683970
Acrisure Midwest Partners Insurance Services, LLC	92-3581561
Acrisure Insurance Partners Services of NY, LLC	92-1504177

Acrisure Southwest Partners Insurance Services, LLC	92-3735736
Acrisure Partners West Coast Insurance Services, LLC	88-4364470
Acrisure Northwest Partners Insurance Services, LLC	92-1242214

- 2) **Product and Price Changes Requirements.** Supplier may request Included Solutions changes, additions, or deletions at any time. All requests must be made in writing by submitting a Sourcewell Price and Product Change Request Form to Sourcewell. At a minimum, the request must:
- Identify the applicable Sourcewell Agreement number;
 - Clearly specify the requested change;
 - Provide sufficient detail to justify the requested change;
 - Individually list all Included Solutions affected by the requested change, along with the requested change (e.g., addition, deletion, price change); and
 - Include a complete restatement of Pricing List with the effective date of the modified pricing, or product addition or deletion. The new pricing restatement must include all Included Solutions offered, even for those items where pricing remains unchanged.

A fully executed Sourcewell Price and Product Change Request Form will become an amendment to this Agreement and will be incorporated by reference.

- 3) **Authorized Representative.** Supplier will assign an Authorized Representative to Sourcewell for this Agreement and must provide prompt notice to Sourcewell if that person is changed. The Authorized Representative will be responsible for:
- Maintenance and management of this Agreement;
 - Timely response to all Sourcewell and Participating Entity inquiries; and
 - Participation in reviews with Sourcewell.

Sourcewell's Authorized Representative is its Chief Procurement Officer.

- 4) **Performance Reviews.** Subject to the party's execution of a mutual non-disclosure agreement, Supplier will perform a minimum of one review with Sourcewell per agreement year. The review will cover transactions to Participating Entities, pricing and terms, administrative fees, sales data reports, performance issues, supply chain issues, customer issues, and any other necessary information.
- 5) **Sales Reporting Required.** Supplier is required as a material element to this Master Agreement to report all completed transactions with Participating Entities utilizing this Agreement. Failure to provide complete and accurate reports as defined herein will be a material breach of the Agreement and Sourcewell reserves the right to pursue all remedies available at law including cancellation of this Agreement.
- 6) **Reporting Requirements.** Supplier must provide Sourcewell an activity report of all transactions completed utilizing this Agreement. Reports are due at least once each calendar quarter (Reporting Period). Reports must be received no later than 45 calendar days after the end of each calendar quarter. Supplier may report on a more frequent basis in its discretion. Reports must be provided regardless of the amount of completed transactions during that quarter (i.e., if there are no sales, Supplier must submit a report indicating no sales were made).

The Report must contain the following fields:

- Participating Entity Name (e.g., City of Staples Highway Department);
- Participating Entity Physical Street Address;
- Participating Entity City;
- Participating Entity State/Province;
- Participating Entity Zip/Postal Code;
- Sourcewell Participating Entity Account Number;
- Transaction Description;
- Transaction Purchased Price;
- Sourcewell Administrative Fee Applied; and
- Date Transaction was invoiced/sale was recognized as revenue by Supplier.

If collected by Supplier, the Report may include the following fields as available:

- Participating Entity Contact Name;
- Participating Entity Contact Email Address;
- Participating Entity Contact Telephone Number;

- 7) **Administrative Fee.** In consideration for the support and services provided by Sourcewell, Supplier will pay an Administrative Fee to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. Supplier will include its Administrative Fee within its proposed pricing. Supplier may not directly charge Participating Entities to offset the Administrative Fee. Therefore, the proposed administration fee shall not be considered commissions and should not be paid to Sourcewell as commissions.
- 8) **Fee Calculation.** Supplier's Administrative Fee payable to Sourcewell will be calculated as a stated percentage (listed in Supplier's Proposal) of all completed transactions utilizing this Master Agreement within the preceding Reporting Period. For certain categories, a flat fee may be proposed. The Administrative Fee will be stated in Supplier's Proposal.
- 9) **Fee Remittance.** Supplier will remit fee to Sourcewell no later than 45 calendar days after the close of the preceding calendar quarter in conjunction with Supplier's Reporting Period obligations defined herein. Payments should note the Supplier's name and Sourcewell-assigned Agreement number in the memo; and must be either mailed to Sourcewell above "Attn: Accounts Receivable" or remitted electronically to Sourcewell's banking institution per Sourcewell's Finance department instructions.
- 10) **Noncompliance.** Sourcewell reserves the right to seek all remedies available at law for unpaid or underpaid Administrative Fees due under this Agreement. Failure to remit payment, delinquent payments, underpayments, or other deviations from the requirements of this Agreement may be deemed a material breach and may result in cancellation of this Agreement and disbarment from future Agreements.
- 11) **Audit Requirements.** Pursuant to Minn. Stat. § 16C.05, subdivision 5, the books, records, documents, and accounting procedures and practices relevant to this Agreement are subject to examination by Sourcewell and the Minnesota State Auditor for a minimum of six years from the end of this Agreement. Supplier agrees to fully cooperate with Sourcewell in auditing transactions under this Agreement to ensure compliance with pricing terms, correct calculation and remittance of

Administrative Fees, and verification of transactions as may be requested by a Participating Entity or Sourcewell.

- 12) **Assignment, Transfer, and Administrative Changes.** Supplier may not assign or otherwise transfer its rights or obligations under this Agreement without the prior written consent of Sourcewell. Such consent will not be unreasonably withheld. Sourcewell reserves the right to unilaterally assign all or portions of this Agreement within its sole discretion to address corporate restructurings, mergers, acquisitions, or other changes to the Responsible Party and named in the Agreement. Any prohibited assignment is invalid. Upon request Sourcewell may make administrative changes to agreement documentation such as name changes, address changes, and other non-material updates as determined within its sole discretion.
- 13) **Amendments.** Any material change to this Agreement must be executed in writing through an amendment and will not be effective until it has been duly executed by the parties.
- 14) **Waiver.** Failure by Sourcewell to enforce any right under this Agreement will not be deemed a waiver of such right in the event of the continuation or repetition of the circumstances giving rise to such right.
- 15) **Complete Agreement.** This Agreement represents the complete agreement between the parties for the scope as defined herein. Supplier and Sourcewell may enter into separate written agreements relating specifically to transactions outside of the scope of this Agreement.
- 16) **Relationship of Sourcewell and Supplier.** This Agreement does not create a partnership, joint venture, or any other relationship such as employee, independent contractor, master-servant, or principal-agent.
- 17) **Indemnification.** Supplier must indemnify, defend, save, and hold Sourcewell, including their agents and employees, harmless from any claims or causes of action, including reasonable attorneys' fees incurred by Sourcewell, arising out of any act or omission in the performance of this Agreement by the Supplier or its agents or employees; this indemnification includes injury or death to person(s) or property alleged to have been caused by some defect in design, condition, or performance of Included Solutions under this Agreement. Sourcewell's responsibility will be governed by the State of Minnesota's Tort Liability Act (Minnesota Statutes Chapter 466) and other applicable law.
- 18) **Data Practices.** Supplier and Sourcewell acknowledge Sourcewell is subject to the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13. As it applies to all data created and maintained in performance of this Agreement, Supplier may be subject to the requirements of this chapter.
- 19) **Grant of License.**
 - a) **During the term of this Agreement:**
 - i) **Supplier Promotion.** Sourcewell grants to Supplier a royalty-free, worldwide, non-exclusive right and license to use the trademark(s) provided to Supplier by Sourcewell in advertising, promotional materials, and informational sites for the purpose of marketing Sourcewell's Agreement with Supplier.

Sourcewell Promotion. Supplier grants to Sourcewell a royalty-free, worldwide, non-exclusive right and license to use Supplier's trademarks in advertising, promotional materials, and informational sites for the purpose of marketing Supplier's Agreement with Sourcewell.

- b) **Limited Right of Sublicense.** The right and license granted herein includes a limited right of each party to grant sublicenses to their respective subsidiaries, distributors, dealers, resellers, marketing representatives, partners, or agents (collectively "Permitted Sublicensees") in advertising, promotional, or informational materials for the purpose of marketing the Parties' relationship. Any sublicense granted will be subject to the terms and conditions of this Article. Each party will be responsible for any breach of this section by any of their respective sublicensees. Failure to have such parties agree to comply with such terms and conditions in writing shall be a breach of this Agreement.
- c) **Use; Quality Control.**
 - i) Neither party may alter the other party's trademarks from the form provided and must comply with removal requests as to specific uses of its trademarks or logos.
 - ii) Each party agrees to use, and to cause its Permitted Sublicensees to use, the other party's trademarks only in good faith and in a dignified manner consistent with such party's use of the trademarks. Each party may make written notice to the other regarding misuse under this section. The offending party will have 30 days of the date of the written notice to cure the issue or the license/sublicense will be terminated.
- d) **Termination.** Upon the termination of this Agreement for any reason, each party, including Permitted Sublicensees, will have 30 days to remove all Trademarks from signage, websites, and the like bearing the other party's name or logo (excepting Sourcewell's pre-printed catalog of suppliers which may be used until the next printing). Supplier must return all marketing and promotional materials, including signage, provided by Sourcewell, or dispose of it according to Sourcewell's written directions.

20) **Venue and Governing law between Sourcewell and Supplier Only.** The substantive and procedural laws of the State of Minnesota will govern this Agreement between Sourcewell and Supplier. Venue for all legal proceedings arising out of this Agreement between Sourcewell and Supplier will be in court of competent jurisdiction within the State of Minnesota. This section does not apply to any dispute between Supplier and Participating Entity. This Agreement reserves the right for Supplier and Participating Entity to negotiate this term to within any transaction documents.

21) **Severability.** If any provision of this Agreement is found by a court of competent jurisdiction to be illegal, unenforceable, or void then both parties will be relieved from all obligations arising from that provision. If the remainder of this Agreement is capable of being performed, it will not be affected by such determination or finding and must be fully performed.

22) **Insurance Coverage.** At its own expense, Supplier must maintain valid insurance policy(ies) during the performance of this Agreement with insurance company(ies) licensed or authorized to do business in the State of Minnesota having an "AM BEST" rating of A- or better, with coverage and limits of insurance not less than the following:

- a) **i) Commercial General Liability Insurance.** Supplier will maintain insurance covering its operations, with coverage on an occurrence basis, and must be subject to terms no less broad than the Insurance Services Office (“ISO”) Commercial General Liability Form CG0001 (2001 or newer edition), or equivalent. At a minimum, coverage must include liability arising from premises, operations, bodily injury and property damage, independent contractors, products-completed operations including, contractual liability, blanket contractual liability, and personal injury and advertising injury. All required limits, terms and conditions of coverage must be maintained during the term of this Agreement.
- \$1,500,000 each occurrence Bodily Injury and Property Damage
 - \$1,500,000 Personal and Advertising Injury
 - \$2,000,000 aggregate for products liability-completed operations
 - \$2,000,000 general aggregate
- ii) **Errors and Omissions Liability Insurance.** Including extended reporting conditions of 2 years with limits of no less than \$1,500,000 per claim, or \$2,000,000 in the aggregate.
- b) **Certificates of Insurance.** Prior to execution of this Agreement, Supplier must furnish to Sourcewell a certificate of insurance, as evidence of the insurance required under this Agreement. Prior to expiration of the policy(ies), renewal certificates of insurance must be mailed to Sourcewell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 or provided to in an alternative manner as directed by Sourcewell. The certificates must be signed by a person authorized by the insurer(s) to bind coverage on their behalf. Failure of Supplier to maintain the required insurance and documentation may constitute a material breach.
- c) **Additional Insured Endorsement and Primary and Non-contributory Insurance Clause.** Supplier agrees to list Sourcewell, including its officers, agents, and employees, as an additional insured under the Supplier’s commercial general liability insurance policy with respect to liability arising out of activities, “operations,” or “work” performed by or on behalf of Supplier, and products and completed operations of Supplier. The policy provision(s) or endorsement(s) must further provide that coverage is primary and not excess over or contributory with any other valid, applicable, and collectible insurance or self-insurance in force for the additional insureds.
- d) **Waiver of Subrogation.** Supplier waives and must require (by endorsement or otherwise) all its insurers to waive subrogation rights against Sourcewell and other additional insureds for losses paid under the insurance policies required by this Agreement or other insurance applicable to the Supplier or its subcontractors. The waiver must apply to all deductibles and/or self-insured retentions applicable to the required or any other insurance maintained by the Supplier or its subcontractors. Where permitted by law, Supplier must require similar written express waivers of subrogation and insurance clauses from each of its subcontractors. Notwithstanding the foregoing any waivers of subrogation (i) shall not be applicable to Supplier’s professional errors and omissions policy; and (ii) shall only be, “to the extent that any liability was not caused by Sourcewell’s gross negligence or willful acts or omissions.”
- e) **Umbrella/Excess Liability/SELF-INSURED RETENTION.** The limits required by this Agreement can be met by either providing a primary policy or in combination with umbrella/excess liability policy(ies), or self-insured retention.

- 23) **Termination for Convenience.** Sourcewell or Supplier may terminate this Agreement upon 60 calendar days' written notice to the other Party. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.
- 24) **Termination for Cause.** Sourcewell may terminate this Agreement upon providing written notice of material breach to Supplier. Notice must describe the breach in reasonable detail and state the intent to terminate the Agreement. Upon receipt of Notice, the Supplier will have 30 calendar days in which it must cure the breach. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.

Article 3: Supplier Obligations to Participating Entities

The Terms in this Article 3 relate specifically to Supplier and a Participating Entity when entering transactions utilizing the General Terms established in this Master Agreement. Article 1 General Terms control over any conflict with this Article 3. Where this Master Agreement is silent on any subject, Participating Entity and Supplier retain the ability to negotiate mutually acceptable terms.

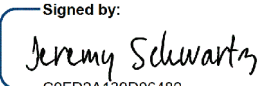
- 1) **Quotes to Participating Entities.** Suppliers are encouraged to provide all pricing information regarding the total cost of acquisition when quoting to a Participating Entity. Suppliers and Participating Entities are encouraged to include all cost specifically associated with or included within the Suppliers proposal and Included Solutions within transaction documents.
- 2) **Shipping, Delivery, Acceptance, Rejection, and Warranty.** Supplier's proposal may include proposed terms relating to shipping, delivery, inspection, and acceptance/rejection and other relevant terms of tendered Solutions. Supplier and Participating Entity may negotiate final terms appropriate for the specific transaction relating to non-appropriation, shipping, delivery, inspection, acceptance/rejection of tendered Solutions, and warranty coverage for Included Solutions. Such terms may include, but are not limited to, costs, risk of loss, proper packaging, inspection rights and timelines, acceptance or rejection procedures, and remedies as mutually agreed include notice requirements, replacement, return or exchange procedures, and associated costs.
- 3) **Applicable Taxes.** Participating Entity is responsible for notifying supplier of its tax-exempt status and for providing Supplier with any valid tax-exemption certification(s) or related documentation.
- 4) **Ordering Process and Payment.** Supplier's ordering process and acceptable forms of payment are included within its Proposal. Participating Entities will be solely responsible for payment to Supplier and Sourcewell will have no liability for any unpaid invoice of any Participating Entity.
- 5) **Transaction Documents.** Participating Entity may require the use of its own forms to complete transactions directly with Supplier utilizing the terms established in this Agreement. Supplier's standard form agreements may be offered as part of its Proposal. Supplier and Participating Entity may complete and document transactions utilizing any type of transaction documents as mutually agreed. In any transaction document entered utilizing this Agreement, Supplier and Participating

Entity must include specific reference to this Master Agreement by number and to Participating Entity's unique Sourcewell account number.

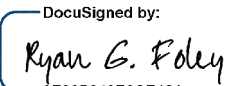
- 6) **Additional Terms and Conditions Permitted.** Participating Entity and Supplier may negotiate and include additional terms and conditions within transaction documentation as mutually agreed. Such terms may supplant or supersede this Master Agreement when necessary and as solely determined by Participating Entity. Sourcewell has expressly reserved the right for Supplier and Participating Entity to address any necessary provisions within transaction documents not expressly included within this Master Agreement, including but not limited to transaction cancellation, dispute resolution, governing law and venue, non-appropriation, insurance, defense and indemnity, force majeure, and other material terms as mutually agreed.
- 7) **Subsequent Agreements and Survival.** Supplier and Participating Entity may enter into a separate agreement to facilitate long-term performance obligations utilizing the terms of this Master Agreement as mutually agreed. Such agreements may provide for a performance period extending beyond the full term of this Master Agreement as determined in the discretion of Participating Entity.
- 8) **Participating Addendums.** Supplier and Participating Entity may enter a Participating Addendum or similar document extending and supplementing the terms of this Master Agreement to facilitate adoption as may be required by a Participating Entity.

NOW THEREFORE, The Parties have agreed to enter into this Master Agreement as of the Effective Date.

Sourcewell

Signed by:

C0FD2A139D06489...
By: _____
Jeremy Schwartz
Title: Chief Procurement Officer
Date: 3/11/2025 | 3:45 PM CDT

Acrisure, LLC

DocuSigned by:

3E99B348E8CE40A...
By: _____
Danielle Nickelson
Title: Executive Vice President
Date: 3/11/2025 | 4:44 PM EDT

RFP 012125 - Risk Management, Employee Benefits, and Insurance Consulting Services

Vendor Details

Company Name: Acrisure
Does your company conduct business under any other name? If yes, please state: Acrisure LLC
Address: 100 Ottawa Ave SW
Grand Rapids, MI 49503
Contact: Shane Heston
Email: spheston@acrisure.com
Phone: 509-765-0242
Fax: 509-766-9095
HST#:

Submission Details

Created On: Tuesday December 10, 2024 10:30:12
Submitted On: Tuesday January 21, 2025 11:34:48
Submitted By: Danielle Nickelson
Email: dsnickelson@acrisure.com
Transaction #: 6cb59af3-086f-480b-aa4d-4888629b6706
Submitter's IP Address: 165.225.60.221

Specifications

Table 1: Proposer Identity & Authorized Representatives (Not Scored)

General Instructions (applies to all Tables) Sourcewell prefers a brief but thorough response to each question. Do not merely attach additional documents to your response without also providing a substantive response. Do not leave answers blank; respond "N/A" if the question does not apply to you (preferably with an explanation).

Table 1 Specific Instructions. Sourcewell requires identification of all parties responsible for providing Solutions under a resulting master agreement(s) (Responsible Supplier). Proposers are strongly encouraged to include all potential Responsible Suppliers including any corporate affiliates, subsidiaries, D.B.A., and any other authorized entities within a singular proposal. All information required under this RFP must be included for each Responsible Supplier as instructed. Proposers with multiple Responsible Supplier options may choose to respond individually as distinct entities, however each response will be evaluated individually and only those proposals recommended for award may result in a master agreement award. Unawarded entities will not be permitted to later be added to an existing master agreement through operation of Proposer's corporate organization affiliation.

Line Item	Question	Response *	
1	Provide the legal name of the Proposer authorized to submit this Proposal.	Acrisure, LLC	*
2	In the event of award, is this entity the Responsible Supplier that will execute the master agreement with Sourcewell? Y or N.	Y	*
3	Identify all subsidiaries, D.B.A., authorized affiliates, and any other entity that will be responsible for offering and performing delivery of Solutions within this Proposal (i.e. Responsible Supplier(s) that will execute a master agreement with Sourcewell).	The below Acrisure entity responsible, will be determined by where the client is located in the United States. Acrisure has the authority to bind all of these entities. Acrisure New England Partners Insurance Services, LLC Acrisure Mid-Atlantic Partners Insurance Services, LLC Acrisure NJ Partners Insurance Services, LLC Acrisure Great Lakes Partners Insurance Services, LLC Acrisure Texas Risk Advisors & Insurance Services, LLC Acrisure Southeast Partners Insurance Services, LLC Acrisure Midwest Partners Insurance Services, LLC Acrisure Insurance Partners Services of NY, LLC Acrisure Southwest Partners Insurance Services, LLC Acrisure Partners West Coast Insurance Services, LLC Acrisure Northwest Partners Insurance Services, LLC	*
4	Provide your CAGE code or Unique Entity Identifier (SAM):	CAGE Code: 7C6K6	*
5	Provide your NAICS code applicable to Solutions proposed.	NAICS Code: 524210	
6	Proposer Physical Address:	100 Ottawa Avenue SW Grand Rapids, MI 49503	*
7	Proposer website address (or addresses):	www.acrisure.com	*
8	Proposer's Authorized Representative (name, title, address, email address & phone) (The representative must have authority to sign the "Proposer's Assurance of Compliance" on behalf of the Proposer):	Danielle Nickelson Authorized Representative 100 Ottawa Ave. SW Grand Rapids, MI 49503 dsnickelson@acrisure.com (616) 317-8399	*
9	Proposer's primary contact for this proposal (name, title, address, email address & phone):	Shane Heston Client Advisor & Partner 108 W Broadway Ave Moses Lake, WA 98837 SPHeston@Acrisure.com (509) 766-9095	*
10	Proposer's other contacts for this proposal, if any (name, title, address, email address & phone):	N/A	*

Table 2A: Financial Viability and Marketplace Success (100 Points, applies to Table 2A and 2B)

Line Item	Question	Response *
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11	Provide a brief history of your company, including your company's core values, business philosophy, and industry longevity related to the requested Solutions.	Founded in 2005 under the leadership of Chairman and CEO Greg Williams, Acrisure stands as a dynamic global leader, specializing in delivering comprehensive insurance and risk management solutions to clients across the globe. With an expansive network of over 1,000 physical locations spanning 21 countries, Acrisure generates \$4.5 billion in annual revenue derived primarily from commission and fees. Today, Acrisure is the largest Property/Casualty Agency in the U.S. and the sixth-largest global broker. At the heart of our mission is the commitment to connect clients with solutions that empower their growth and safeguard their valued assets. Clients partnering with Acrisure gain access to a wealth of benefits, including specialized market expertise, extensive coverage of industry-specific specialties, personalized program development, direct access to expert programs, global coverage capabilities, robust claims management resources and a suite of innovative proprietary tools. This commitment allows Acrisure to consistently deliver cutting-edge products and services to its clients. Furthermore, Acrisure ensures competitive pricing, coverage, and carrier relationships, aligning itself with the standards of a global top ten broker. Beyond business, Acrisure extends its core philosophy of being a great partner to the realms of volunteerism and community giving. Our dedication to making a positive impact is reflected in our support for diverse causes, ranging from children's health and education to environmental sustainability and biomedical research. Acrisure remains steadfast in its pursuit of excellence, not only as an industry leader but also as a responsible corporate citizen.	*
12	What are your company's expectations in the event of an award?	In the event of an award, Acrisure's expectations revolve around fostering a collaborative and mutually beneficial partnership with Sourcewell. We anticipate clear and open communication channels to ensure transparency and alignment of goals. Our aim is to deliver exceptional service and innovative solutions that meet and exceed the expectations outlined in this RFP. We expect to work closely with your team to fully understand your needs and objectives, allowing us to tailor our approach for optimal results. Ultimately, our goal is to build a long-term, trust-based relationship that drives success for both parties.	*
13	Demonstrate your financial strength and stability with meaningful data. This could include such items as financial statements, SEC filings, credit and bond ratings, letters of credit, and detailed reference letters. Upload supporting documents (as applicable) in the document upload section of your response. DO NOT PROVIDE ANY TAX INFORMATION OR PERSONALLY IDENTIFIABLE INFORMATION.	With an expansive network of over 1,000 physical locations spanning 21 countries, Acrisure generates \$4.5 billion in annual revenue derived primarily from commission and fees. Today, Acrisure is the largest Property/Casualty Agency in the U.S. and the sixth-largest global broker. If we are selected for this opportunity, we will provide a summary of our financials via secure link conditioned on the signing of a non-disclosure agreement.	*
14	What is your US market share for the Solutions that you are proposing?	For the past three years, Education premium share makes up 3.62% of Acrisure's total premiums. Public Admin makes up 6.6%.	*
15	Disclose all current and completed bankruptcy proceedings for Proposer and any included possible Responsible Party within the past seven years. Proposer must provide notice in writing to Sourcewell if it enters a bankruptcy proceeding at any time during the pendency of this RFP evaluation.	Our firm (and predecessor or affiliate firms) has never filed for bankruptcy.	*
16	How is your organization best described: is it an agency, broker, etc?	Acrisure is best described as a leading insurance brokerage firm. As a brokerage, we act as an intermediary between clients and insurance carriers, leveraging our extensive network and market expertise to provide tailored insurance and financial solutions. Our role involves understanding the unique needs of our clients, negotiating with multiple insurers on their behalf, and ensuring they receive the most comprehensive coverage at competitive rates. This brokerage model allows us to offer a diverse range of products and services, ensuring that we meet the specific requirements of each client with unparalleled precision and care.	*
17	If applicable, provide a detailed explanation outlining the licenses and certifications that are both required to be held, and actually held, by your organization (including third parties and subcontractors that you use) in pursuit of the business contemplated by this RFP.	As a nationwide insurance brokerage, Acrisure holds the necessary certifications and insurance licenses to operate in all 50 states.	*
18	Disclose all current and past debarments or suspensions for Proposer and any included possible Responsible Party within the past seven years. Proposer must provide notice in writing to Sourcewell if it enters a debarment or suspension status any time during the pendency of this RFP evaluation.	Acrisure, LLC is an international company that has hundreds of wholly owned companies under its umbrella. To the best of our knowledge, information, and belief, no member of Acrisure's professional staff has been named as a defendant in a civil suit or criminal proceeding alleging malpractice, negligence, breach of contract, fraud, dishonesty, or breach of professional duty. Acrisure, LLC is or has been involved in litigation in the ordinary course of business, including claims by and against such clients. Upon information and belief, no past or current litigation is material or will affect Acrisure, LLC's ability to conduct business with Sourcewell.	*

19	Describe any relevant industry awards or recognition that your company has received in the past five years.	<p>Acrisure has been recognized for its outstanding performance and innovation in the insurance and risk management industries over the past five years. Notable awards and honors include:</p> <p>1. Inc. 5000 List: Acrisure has consistently been featured on the Inc. 5000 list, which highlights the fastest-growing private companies in America. This recognition underscores the company's rapid growth and success in the marketplace.</p> <p>2. Retail Broker of the Year Award: Acrisure received the Retail Broker of the Year Award in 2024 from Insurance Insider US, further establishing its reputation as a major player in the insurance brokerage industry.</p> <p>3. Business Insurance's Best Places to Work: Acrisure has been named one of the Best Places to Work in Insurance by Business Insurance magazine. This honor reflects our company's commitment to creating a positive and supportive work environment for its employees.</p> <p>4. EY Entrepreneur of the Year Award: Acrisure's Co-Founder, Chairman and CEO Greg Williams was named the Ernst & Young Entrepreneur of The Year in 2022, for Michigan and Northwest Ohio. This award celebrates the achievements of exceptional entrepreneurs who are building and leading successful, growing, and dynamic businesses.</p> <p>5. Private Equity International Awards: Acrisure has received accolades from Private Equity International for its impressive growth and strategic acquisitions</p>	*
20	What percentage of your sales are to the governmental sector in the past three years?	Public Admin premiums make up 4.87% over the past three years.	*
21	What percentage of your sales are to the education sector in the past three years?	Education premiums make up 2.54% over the past three years.	*
22	List all state, cooperative purchasing agreements that you hold. What is the annual sales volume for each of these agreement over the past three years?	Acrisure is a complex international organization. This information is not readily available; however, we will endeavor to provide such information upon further request.	*
23	List any GSA contracts or Standing Offers and Supply Arrangements (SOSA) that you hold. What is the annual sales volume for each of these contracts over the past three years?	Acrisure is a complex international organization. This information is not readily available; however, we will endeavor to provide such information upon further request.	*

Table 2B: References/Testimonials

Line Item 24. Supply reference information from three customers who are eligible to be Sourcwell participating entities.

Entity Name *	Contact Name *	Phone Number *	
Grant County	Cindy Carter, Board of County Commissioner	509-765-2011	*
Moses Lake School District	Mitch Thompson, Chief Financial Officer, Asst. Supt.	509-793-7790	*
Franklin County Fire District #3	Michael Harris, Fire Chief	509-547-9306	*

Table 3: Ability to Sell and Deliver Solutions (200 Points)

Describe your company's capability to meet the needs of Sourcwell participating entities across the US and Canada, as applicable. Your response should address in detail at least the following areas: locations of your network of sales and service providers, the number of workers (full-time equivalents) involved in each sector, whether these workers are your direct employees (or employees of a third party), and any overlap between the sales and service functions.

Line Item	Question	Response *	
25	Sales force.	Acrisure employs professionals operating from over 1,000 office locations worldwide. Our extensive network of offices allows us to provide localized and personalized service to our diverse client base.	*

26	Describe the network of agents, brokers, and consultants who will deliver Solutions, including dealers, distributors, resellers, and other distribution methods.	<p>Acrisure boasts an extensive network of agents, brokers, and consultants that spans across various specialties and regions to deliver tailored insurance, risk management, and employee benefits solutions. Our network is designed to provide comprehensive coverage and exceptional service through the following distribution methods:</p> <ol style="list-style-type: none"> 1. Agents and Brokers: Our agents and brokers are highly skilled professionals located in strategic regions across the United States. They specialize in various lines of business, including commercial, personal lines, employee benefits, and specialty insurance. Our agents and brokers work closely with clients to understand their unique needs and offer the most suitable solutions. 2. Consultants: Our consultants bring a wealth of knowledge and experience in specific industries and risk management practices. They collaborate with clients to develop strategic plans that mitigate risks and enhance operational efficiency. 3. Dealers and Distributors: We partner with reputable dealers and distributors to ensure that our solutions are accessible and delivered efficiently. These partnerships enable us to extend our reach and provide localized support to clients across different regions. 4. Resellers: Our reseller network includes third-party organizations that are carefully selected based on their expertise, market presence, and commitment to customer service, ensuring that they uphold Acrisure's standards of excellence. 5. Technology Solutions: Acrisure leverages cutting-edge technology to enhance our distribution methods. Our digital platforms enable clients to access our services seamlessly and receive real-time support. This technological integration ensures that our clients receive timely and efficient solutions, regardless of their location. 	*
27	Service force.	Acrisure's service professionals are strategically located across various regions to ensure comprehensive and responsive support to our clients.	*
28	Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others.	<p>Acrisure is committed to providing a seamless and efficient ordering process for our clients. Below is a high-level description of our ordering process:</p> <ol style="list-style-type: none"> 1. Client Consultation: The ordering process begins with an initial consultation between the client and one of our highly skilled client advisors. During this consultation, the client's unique needs and requirements are thoroughly assessed to determine the most suitable solutions. 2. Proposal Development: Based on the consultation, our professionals develop a customized proposal that outlines the recommended offering. This proposal includes detailed information on coverage options, pricing, and any additional services that may be beneficial to the client. 3. Client Approval: Once the proposal is developed, it is presented to the client for review and approval. Our client advisors work closely with the client to address any questions or concerns and ensure that the proposal meets their expectations. 4. Order Placement: Upon client approval, the order is officially placed. Our client advisors handle the order placement, ensuring that all necessary documentation and information are accurately submitted. 5. Order Processing: Once the order is placed, our team and distribution network take over to process the order. This includes verifying the order details, coordinating with any relevant parties, and preparing the necessary policies or services for delivery. 6. Delivery and Implementation: The final step in the ordering process is the delivery and implementation of the ordered products and services. Depending on the specific order, this may involve the issuance of insurance policies, the activation of technology solutions, or other related services. Our client advisors, in close communication with the client to ensure a smooth implementation. <p>Acrisure is responsible for overseeing the entire ordering process and ensuring that all parties involved work together seamlessly.</p> <p>Our role includes:</p> <ul style="list-style-type: none"> • Conducting client consultations and needs assessments • Developing and presenting customized proposals • Handling order placement and processing • Coordinating with distributors, dealers, and other partners • Ensuring timely and accurate delivery of products and services • Providing ongoing client support and addressing any issues that may arise 	*
29	Describe in detail the process and procedure of your customer service program, if applicable. Include your response-time capabilities and commitments, as well as any incentives that help your providers meet your stated service goals or promises.	<p>Acrisure is known for its exceptional customer service. We take a consultative approach, understanding the unique need of our clients and providing tailored solutions. With the Acrisure team, client satisfaction comes first, and we can assure you that your team will receive the highest quality of service 24 hours a day and 365 days a year. Our culture mandates that we surpass our competitors with a high touch risk management consultancy model that is tailored to the needs of every client we are fortunate enough to partner with. It is our goal to become an extension of your team.</p> <p>Our standard response time is as fast as possible, but certainly within 24 hours. Acrisure's service protocol is custom designed during our partnership implementation but can be reconfigured as needed to meet shifts in your organization.</p>	*

30	Describe your ability and willingness to provide your products and services to Sourcewell participating entities.	Using the full resources of Acrisure from teams from across the United States we have the business acumen to deliver our products and services from anywhere, in person or virtually. We have a dedicated team and coordinator overseeing the delivery of our products and services to participating entities, specific for public entities and for the Sourcewell member services.	*
31	Identify any account type of Participating Entity which will not have full access to your Solutions if awarded an agreement, and the reasoning for this.	All of the various entities listed in Table 1 Section 3 have various business units within them, that combined, are able to offer every client the full gamut of insurance broker services in both employee benefits and property and casualty lines of coverage.	*
32	Define any specific requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	Acrisure is licensed and insured to do business in all 50 domestic states, as well as numerous international territories. However, coverage options may vary based on jurisdictional regulations and requirements.	*
33	Will Proposer extend terms of any awarded master agreement to nonprofit entities?	Acrisure can provide services to nonprofit entities.	*
34	In which states does your organization hold agency or individual insurance licenses?	Acrisure is licensed and insured to do business in all 50 domestic states, as well as numerous international territories.	
35	What region of the United States does your organization primarily serve? List the number of public sector clients your organization serves in each state.	<p>Acrisure breaks out Education and Public Admin as two separate industries. The numbers below represent the combined total of active Education and Public Admin clients by state.</p> <p>Alabama - 4 Alaska - 117 Arizona - 17 Arkansas - 46 California - 667 Colorado - 69 Connecticut - 142 Delaware - 1 District of Columbia - 13 Florida - 198 Georgia - 28 Hawaii - 39 Idaho - 116 Illinois - 282 Indiana - 229 Iowa - 325 Kansas - 99 Kentucky - 59 Louisiana - 35 Maine - 6 Maryland - 97 Massachusetts - 73 Michigan - 920 Minnesota - 6 Mississippi - 3 Missouri - 192 Montana - 1 Nebraska - 6 Nevada - 11 New Hampshire - 4 New Jersey - 736 New Mexico - 6 New York - 547 North Carolina - 18 North Dakota - 39 Ohio - 1,472 Oklahoma - 18 Oregon - 90 Pennsylvania - 396 Rhode Island - 3 South Carolina - 26 South Dakota - 251 Tennessee - 425 Texas - 209 Utah - 32 Vermont - 269 Virginia - 29 Washington - 295 West Virginia - 2 Wisconsin - 25 Wyoming - 9</p>	
36	What lines of insurance coverage does your organization offer public sector?	Acrisure can provide all lines of insurance coverage to clients in the public sector.	

37	How many insurance carrier appointments does your organization have that have a current appetite for public sector? Please identify the number of carriers appointments by line of coverage your organization is offering on this contract.	Acrisure is a complex international organization. This information is not readily available, however, we will endeavor to provide such information upon further request.
38	Does your agency represent any clients that participate in government risk pools for either employee benefits or property/casualty? If so, how do your services change, alter, or coordinate with services offered by the risk pool?	Yes, Acrisure provides a full range of services to our Risk Pool members, including on site safety, health, HR, Risk Management, wellness, and property protection assessments.
39	Describe how your agency regularly communicates and provides educational opportunities to your producing salesforce?	<p>We are committed to compliance and regulatory training, ensuring that our teams remain at the forefront of the latest regulations, laws, and industry standards through regular training sessions and certifications. We regularly collaborate with subject matter experts within our organization and even engage external experts to deliver specialized training sessions, ensuring our team receives up-to-date and industry-relevant knowledge.</p> <p>Acrisure conducts regular training needs assessments to identify the specific additional areas where our teams require training. We have a robust learning management system (LMS) in place that allows easy access to training materials, tracks progress and provides certifications upon completion.</p>
40	What local agency team specialists are available to work directly with public agencies?	Acrisure is proud to have a dedicated team of sales professionals with extensive expertise in the public entity space across the United States. Our experts specialize in various aspects of public entity insurance consulting, employee benefits, and risk management services.

Table 4: Marketing Plan (125 Points)

Line Item	Question	Response *
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41	Describe your marketing strategy for promoting this opportunity. Upload representative samples of your marketing materials (if applicable) in the document upload section of your response.	<p>At Acrisure, our marketing strategy for promoting this opportunity is comprehensive and multi-faceted, designed to effectively reach our target audience and generate significant interest and engagement. Our approach includes the following key components:</p> <ol style="list-style-type: none"> 1. Targeted Digital Campaigns: <ul style="list-style-type: none"> o Email Marketing: We leverage our extensive database of existing clients and prospects to deliver personalized email campaigns. These emails highlight the unique benefits and value of the services we offer, accompanied by compelling calls-to-action. o Social Media Marketing: We utilize platforms such as LinkedIn, Twitter, and Facebook to share informative content, success stories, and client testimonials. Our social media strategy is designed to engage with relevant industry groups and forums to increase visibility and foster community engagement. 2. Content Marketing: <ul style="list-style-type: none"> o Blog Posts and Articles: We regularly publish insightful articles and blog posts on our website, focusing on industry trends, case studies, and expert tips related to risk management and insurance. This content aims to educate our audience and position Acrisure as a thought leader in the field. o Webinars and Online Workshops: Hosting webinars and online workshops allows us to provide valuable information and interact directly with potential clients. These sessions cover various topics, including strategic planning, compliance, and technology integration. 3. Collaborative Partnerships: <ul style="list-style-type: none"> o Industry Associations: We actively collaborate with industry associations such as the County and Cities Associations, School and School Directors Associations, water, fire, EMS, public utility groups and associations. These partnerships enable us to reach a broader audience and leverage the associations' networks for promotional activities. o Local Community Involvement: As many of our Acrisure teams are spread across the entire United States many are members of the local Chamber of Commerce, the Boys and Girls Clubs, and other service organizations and are participants and supporting in local events and initiatives that align with our marketing goals. This involvement helps build strong local brand awareness and trust within the community. 4. Traditional Marketing: <ul style="list-style-type: none"> o Print Media: We design and distribute brochures, flyers, and other print materials at industry conferences, trade shows, and community events. These materials provide a tangible representation of our services and reinforce our brand message. o Public Relations: Our PR strategy includes issuing press releases and securing media coverage in relevant industry publications. This approach helps us reach a wider audience and enhances our credibility in the market. 5. Client Testimonials and Case Studies: <ul style="list-style-type: none"> o We showcase success stories and testimonials from satisfied clients to demonstrate the tangible benefits of our services. These case studies are featured on our website, in email campaigns, and in marketing materials to build trust and credibility with potential clients. 6. Centers of Excellence (COE): <ul style="list-style-type: none"> o State and Region-Specific COEs: Each state and region will have a Center of Excellence (COE) dedicated to public entities. These COEs will attend trade shows and conferences, prominently displaying and featuring the "Sourcewell Approved Vendor" status specific to our offerings. o Focused Marketing and Branding: This marketing and branding will be featured on all our information specific to public entities, including marketing materials, social media, and other relevant platforms. 7. Brand Recognition and Market Expansion: <ul style="list-style-type: none"> o Leverage Acrisure's Brand: Based on Acrisure's strong brand recognition and our current data and market share, we expect the Sourcewell brand to further expand. Our established acumen in the market will help enhance Sourcewell's reach and impact.
42	Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.	<p>Acrisure's marketing department leverages advanced technology and digital data to significantly enhance our marketing effectiveness. By utilizing social media platforms, we engage with our audience in real time, ensuring our messages are both timely and relevant. Our data analytics tools enable us to analyze metadata, providing valuable insights into customer behavior and preferences. This information allows us to tailor our marketing strategies to better meet the needs of our clients. Additionally, we employ targeted digital advertising campaigns, using sophisticated algorithms to reach the right audience at the right time. These efforts not only improve our marketing precision but also drive higher engagement and conversion rates, ultimately contributing to our business growth and customer satisfaction.</p>
43	In your view, what is Sourcewell's role in promoting agreements arising out of this RFP? How will you integrate a Sourcewell-awarded agreement into your sales process?	<p>Acrisure is eager to collaborate with Sourcewell to explore cross-marketing opportunities arising from the result of this RFP.</p>

44	Describe your insurance marketing philosophy and strategy for making carrier or solution recommendations?	<p>To assist with the competitive marketing and placement of your plans, our approach is both strategic and comprehensive, reflecting our commitment to delivering value-driven, client-centric solutions. Our process is designed to ensure that your organization benefits from a well-crafted benefits program that aligns with your specific needs and objectives, leveraging our deep industry expertise and market insights. Here's how we will support you through each critical phase of the process:</p> <ol style="list-style-type: none"> 1. Development of Marketing Specifications: Our initial step involves a collaborative effort with your team to deeply understand your organization's unique requirements, goals, and the specific nuances of your employee demographics. This understanding forms the foundation upon which we develop tailored marketing specifications. These specifications encompass your desired plan design, coverage requirements, and any other pertinent details, ensuring that the proposals we solicit closely align with your strategic objectives. 2. Identification of Market Conditions: Leveraging our extensive market knowledge and continuous monitoring of industry trends, we provide you with a detailed analysis of the current insurance market landscape. This includes benchmarking data against peer organizations, insights into competitor offerings, and an understanding of emerging practices within the benefits sphere. Our goal here is to position your organization advantageously in the marketplace, informed by a comprehensive view of available options and opportunities. 3. Evaluation of Proposals: Upon receipt of proposals from insurance carriers, our team undertakes a rigorous evaluation process. Each proposal is reviewed against the previously developed marketing specifications to assess its alignment with your needs. We delve into the details, analyzing plan design, pricing, network options, customer service capabilities, and the financial stability of the carriers. This ensures that we present you with options that not only meet but exceed your expectations. 4. Negotiations: Armed with in-depth market knowledge and our in-house underwriting expertise, we engage in robust negotiations with insurance carriers. Our objective is to secure the most favorable rates, plan enhancements, and contract terms on your behalf. 5. Placement of Insurance Contracts: Once negotiations conclude and the best-fit solutions are identified, we facilitate the placement of insurance contracts for annual renewals. Our team coordinates all necessary paperwork, manages the contract signing process, and ensures a seamless transition to the new contract term. <p>Throughout the entire process, our commitment to your organization extends beyond mere transactional interactions. We see ourselves as your advocate, dedicated to securing a benefits program that is not only cost-efficient but also responsive to the evolving needs of your employees.</p>
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45	Describe in detail the procurement process your agency would conduct on behalf of public sector clients.	<p>Acrisure follows a structured and transparent approach to ensure compliance with regulatory requirements and to deliver the best value for our clients. Below is a detailed outline of the process:</p> <ol style="list-style-type: none"> 1. Needs Assessment: <ul style="list-style-type: none"> o Initial Consultation: Engage with the client to understand their specific needs, objectives, and risk profile. o Data Collection: Gather relevant data and documentation, including current insurance policies, claims history, and financial statements. o Risk Analysis: Conduct a thorough risk assessment to identify potential exposures and coverage gaps. 2. Market Research: <ul style="list-style-type: none"> o Market Analysis: Research the insurance market to identify potential carriers and products that best meet the client's needs. o Carrier Evaluation: Evaluate insurance carriers based on their financial stability, reputation, claims handling process, and experience with similar public sector clients. 3. Request for Proposals (RFP): <ul style="list-style-type: none"> o RFP Preparation: Develop a comprehensive RFP document that includes detailed specifications, coverage requirements, and evaluation criteria. o Solicitation: Distribute the RFP to selected insurance carriers and brokers, ensuring a competitive bidding process. 4. Bid Evaluation: <ul style="list-style-type: none"> o Bid Receipt: Collect and organize all bids received from the insurance carriers. o Technical Evaluation: Assess the technical aspects of each bid, including coverage terms, conditions, and exclusions. o Financial Evaluation: Analyze the financial aspects of each bid, including premiums, deductibles, and potential cost savings. 5. Negotiation: <ul style="list-style-type: none"> o Carrier Negotiation: Engage in negotiations with the shortlisted carriers to obtain the best possible terms and conditions for the client. o Terms Finalization: Finalize the terms, ensuring that the coverage meets the client's needs and budget. 6. Recommendation: <ul style="list-style-type: none"> o Proposal Presentation: Present a detailed proposal to the client, outlining the recommended insurance program, including coverage options, carrier selection, and pricing. o Client Approval: Obtain approval from the client to proceed with the selected insurance program. 7. Implementation: <ul style="list-style-type: none"> o Policy Issuance: Coordinate with the chosen carriers to issue the insurance policies and ensure that all documentation is accurate and complete. o Program Launch: Implement the insurance program, including distributing policy documents to the client and providing any necessary training or orientation. 8. Ongoing Management: <ul style="list-style-type: none"> o Policy Administration: Provide ongoing support for policy administration, including endorsements, renewals, and compliance with regulatory requirements. o Claims Management: Assist the client with claims reporting, management, and resolution to ensure timely and fair settlements. o Risk Management: Offer continuous risk management services, including loss prevention strategies, safety training, and regular reviews of the insurance program.
46	Does your organization charge a fee to insurance carriers, technology platforms, point solutions or any other company in order for those companies to receive opportunities from your organization?	No.

Table 5A: Value-Added Attributes (50 Points, applies to Table 5A and 5B)

Line Item	Question	Response *
47	Describe any training programs that you offer to Sourcewell participating entities. Include details, such as whether training is standard or optional, who provides training, and any costs that apply.	<p>Acrisure will organize regular workshops and seminars, either on-site or through virtual platforms, covering various aspects of insurance and risk management tailored to your industry. Topics may include emerging risks, changes in insurance regulations, and advanced risk mitigation strategies. This allows your organization to stay updated on new regulations, technologies, and emerging practices.</p>

48	Describe any technological advances that your proposed Solutions offer.	<p>Acrisure deploys technology at an unprecedented scale. Our company's robust network combines the strength of trusted advisors with growth and efficiency enabled by rich data and high tech. We provide tech enabled financial service products through the best of humans and high tech: a differentiated tech platform and team of experienced sales professionals.</p> <p>Our industry-leading AI and proprietary technology platform, Auris, harnesses massive amounts of data to enhance client experience and meet their diverse financial needs. We use AI to increase efficiencies and provide better service to clients, incorporating feedback from our sales professionals to improve our proprietary technology and tools. Our clients have direct access to specialized programs, products and solutions across financial services.</p>	*
49	Describe any "green" initiatives that relate to your company or to your Solutions, and include a list of the certifying agency for each.	At Acrisure, we are dedicated to sustainability and environmental stewardship. Our green initiatives focus on enhancing energy efficiency, transitioning to paperless operations, promoting sustainable procurement, implementing recycling programs, reducing our carbon footprint, and adopting green building practices.	*
50	What unique attributes does your company, your products, or your services offer to Sourcewell participating entities? What makes your proposed solutions unique in your industry as it applies to Sourcewell participating entities?	<p>Acrisure distinguishes itself from other brokers through several key differentiators:</p> <ol style="list-style-type: none"> 1. Technology Integration: Acrisure heavily leverages advanced technology, including AI and data analytics, to provide innovative and efficient solutions for their clients. This tech-forward approach allows them to offer personalized and scalable services. 2. Global Reach with Local Expertise: While Acrisure has a broad international presence, it maintains strong local expertise through its network of partners and agencies. This combination ensures clients receive both global resources and local market knowledge. 3. Client-Centric Approach: Acrisure places a strong emphasis on understanding and meeting the unique needs of each client. Their solutions are tailored to provide the best possible outcomes, ensuring high levels of client satisfaction and retention. 4. Broad Range of Services: Beyond traditional insurance brokerage, Acrisure offers a wide array of services, including risk management, employee benefits, and financial services. This comprehensive service offering allows clients to meet multiple needs through a single provider. 5. Innovative Culture: Acrisure fosters a culture of innovation and continuous improvement. This mindset drives the company to constantly seek new ways to enhance their services and deliver value to their clients. 6. Strong Partnerships: Acrisure's model of partnering with high-performing agencies allows them to leverage the strengths of these partners while providing them with the resources and support of a larger organization. This hybrid model combines the agility of smaller firms with the capabilities of a large enterprise. 7. Ethical Standards and Compliance: As mentioned earlier, Acrisure is committed to maintaining high ethical standards and stringent compliance with industry regulations. This commitment builds trust and reliability with clients and partners alike. 	*
51	Describe how you stay current with ethics and public sector procurement requirements.	Keeping up with legislation and its impact on client plans is ingrained in our daily work. The Acrisure Compliance Solutions (ACS) team communicates relevant developments on a regular basis through timely alerts, monthly briefs, weekly newsletters, and monthly webinars. The in-house Acrisure Compliance Solutions team is responsible for monitoring and educating our team members, consultants, advisors, and clients on all new benefits legislation and compliance requirements.	
52	Do you provide employee communication services for your clients' employees? If so, provide a general description of your capabilities. Also include a sample of employee communication materials that you have distributed to other clients.	<p>Our internal creative marketing department, comprised of talented professionals, oversees the design and development of our employee communication materials. We offer a wide array of resources, including benefits booklets, fliers, brochures, and other printed materials. These materials are thoughtfully crafted to convey information in a visually appealing and engaging manner, ensuring that your employees are motivated to explore and understand their benefits.</p> <p>In addition to printed materials, we also offer a customized benefits website that is built by our in-house web designers. This website serves as a central hub of information, providing employees with easy access to important documents, FAQs, and other resources. Our team will work closely with you to create a website that aligns with your organization's branding and meets the specific needs of your employees.</p> <p>To facilitate effective communication, we offer various avenues for engagement. We conduct on-site open enrollment meetings, where our experienced professionals guide employees through the enrollment process and address any questions or concerns they may have. Additionally, we provide webinars that can be recorded and posted on your employee benefit website, allowing employees to access the information at their convenience.</p> <p>Furthermore, we understand the value of carrier presentations and their impact on employee understanding and engagement. As part of our services, we coordinate carrier presentations, ensuring that your employees can interact directly with the providers of their benefits. Additionally, we organize ongoing employee education meetings, where employees can learn more about their benefits and how to best utilize their plans throughout the year.</p> <p>At Acrisure, we pride ourselves on our ability to tailor our services to meet the unique needs of each client. Whatever your requirements may be, we have the expertise and resources to create customized communication materials and platforms. We understand that effective communication is crucial in supporting employee engagement and satisfaction, and we are committed to delivering the most sophisticated programs in the marketplace.</p>	

53	What resources do you provide to help your clients remain compliant?	<p>Keeping up with legislation and its impact on client plans is ingrained in our daily work. The Acrisure Compliance Solutions (ACS) team communicates relevant developments on a regular basis through timely alerts, monthly briefs, weekly newsletters, and monthly webinars. The in-house Acrisure Compliance Solutions team is responsible for monitoring and educating our team members, consultants, advisors, and clients on all new legislation and compliance requirements. Acrisure keeps our clients informed and educated through multiple channels:</p> <ul style="list-style-type: none"> • We update you on market trends, as well as legislative and regulatory developments and the impact of these developments on your specific plans, during proactively scheduled meetings throughout the year. • We provide regularly distributed Benefits and HR newsletters. • We host monthly live webinars on different Benefits and HR topics. • We distribute Benefits and HR bulletins that highlight breaking news and/or timely developments that may affect your employees and benefit plans. • When appropriate, we host onsite educational sessions. <p>Our expert team will help ensure that you are meeting your compliance obligations. We will conduct an initial assessment that follows a checklist and evaluation process. Thereafter, we conduct annual or periodic reviews as needed and follow a strict checklist for annual compliance needs such as 5500 reporting, annual notices, SARs, SMMs, and plan document needs. We maintain a rigorous process of compliance training for our employees as well as our clients and we make sure you stay up to date and are informed of any changes to laws or regulations that may affect your employee benefit program. Our firm is committed to helping you with complex plan administration and legislative compliance, using a variety of internal and external resources.</p>
54	What types of materials can you provide to communicate pertinent information to client's employees?	<p>Acrisure offers customized websites and employee communication tools to streamline information dissemination. These websites can house compliance notices, plan documents, and other relevant information. We can also create customized benefit booklets and prepare communication blasts to introduce employees to our services and resources. The following link contains sample sites and benefit guides designed in-house by our marketing & communications team: https://demomysite.net</p>
55	Do you have any internet-based employee communication tools?	Yes, please refer to the response above to line item 54.
56	What safety training assistance does your firm provide?	<p>Acrisure can provide training programs, employee education initiatives, and ongoing support to promote a culture of safety within your organization. We welcome the opportunity to learn more about the specific needs of Sourcewell participating entities in the area of safety training.</p>
57	How does your firm ensure compliance with regulatory requirements?	<p>At Acrisure we have a dedicated compliance team that stays updated on the latest regulations, laws, and industry standards. This team ensures that the company and its employees are aware of any changes and updates in compliance requirements.</p> <p>We provide our employees with training programs focused on compliance to educate our teams on relevant regulations and requirements. This may include workshops, seminars, webinars, and online training modules to ensure that employees have the necessary knowledge.</p> <p>Our employees also participate in a variety of industry associations and networks that provide updates and resources related to compliance requirements. They help us stay informed about best practices and regulatory changes specific to the industry.</p>

Table 5B: Value-Added Attributes

Line Item	Question	Certification	Offered	Comment	
58	Select any Women or Minority Business Entity (WMBE), Small Business Entity (SBE), or veteran owned business certifications that your company or hub partners have obtained. Upload documentation and a listing of dealerships, HUB partners or resellers if available. Select all that apply.		<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A - Acrisure does not hold any of the below business certifications.	*
59		Minority Business Enterprise (MBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
60		Women Business Enterprise (WBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
61		Disabled-Owned Business Enterprise (DOBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
62		Veteran-Owned Business Enterprise (VBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
63		Service-Disabled Veteran-Owned Business (SDVOB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
64		Small Business Enterprise (SBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
65		Small Disadvantaged Business (SDB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
66		Women-Owned Small Business (WOSB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*

Table 6A: Pricing (400 Points, applies to Table 6A and 6B)

Provide detailed pricing information in the questions that follow below.

Line Item	Question	Response *	
67	Describe your payment terms and accepted payment methods.	<p>At Acrisure, we strive to make our payment terms and accepted payment methods as clear and convenient as possible for Sourcewell Members. Here is a detailed breakdown:</p> <p>Payment Terms:</p> <ul style="list-style-type: none"> • Net 30: Payment is due within 30 days from the invoice date. • Net 60: Payment is due within 60 days from the invoice date, depending on the specific agreement. • Installment Plans: For certain insurance policies, we offer installment plans, allowing clients to spread out payments over the policy term. <p>Accepted Payment Methods:</p> <ul style="list-style-type: none"> • Electronic Funds Transfer (EFT): Clients can set up automatic payments from their bank accounts. • Credit/Debit Cards: We accept major credit and debit cards for payments. • Checks: Clients can mail checks to the address provided on their invoice. • Online Payments: Secure online payment options are available through our client portal 	*

68	Describe any standard transaction documents that you propose to use in connection with an awarded agreement (order forms, terms and conditions, service level agreements, etc.). Upload all template agreements or transaction documents which may be proposed to Participating Entities.	Please refer to the attachment titled "Acrisure Sample Client Services Agreement" included in the "Standard Transaction Documents" upload section.	*
69	Describe your billing process.	At Acrisure, our billing process is designed to be transparent and client-friendly, ensuring that Sourcewell Members will have a seamless experience. Here's a detailed breakdown of our billing process: 1. Invoice Generation: a. Timing: Invoices are generated at the beginning of each billing cycle. For annual policies, this typically occurs once a year, while for monthly or quarterly plans, it happens at the respective intervals including agreed upon services. b. Content: Each invoice includes a detailed breakdown of the services provided, the corresponding charges, and any applicable taxes or fees. 2. Delivery Method: a. Email: Invoices are sent electronically to the email address on file. b. Postal Mail: For clients who prefer physical copies, invoices can be mailed directly to the billing address provided. 3. Payment Confirmation: a. Receipt: Upon receiving payment, a confirmation receipt is sent to the client. b. Account Update: The payment is promptly applied to the client's account balance. 4. Follow-Up: a. Reminders: If a payment is not received by the due date, a courtesy reminder is sent. b. Support: Our billing department is available to assist with any questions or concerns regarding invoices.	*
70	Describe your pricing model (e.g., line-item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcewell discounted price) on all of the items that you want Sourcewell to consider as part of your RFP response. If applicable, provide a SKU for each item in your proposal. Upload your pricing materials (if applicable) in the document upload section of your response.	Please refer to the attachment titled "Acrisure Tiered Pricing Model for Sourcewell" included in the Pricing Attachment section of our response.	*
71	Quantify the pricing discount represented by the pricing proposal in this response. For example, if the pricing in your response represents a percentage discount from MSRP or list, state the percentage or percentage range.	Pricing has been discounted at 25% for Sourcewell members included in the current pricing structure. Some services would be included at no additional cost for members that purchased insurance products from Acrisure and would be included as value added member services.	*
72	Describe any quantity or volume discounts or rebate programs that you offer.	Our services are discounted for members that purchase insurance products from Acrisure, some of which are steeply discounted or included as valued added member services.	*
73	Propose a method of facilitating "sourced" products or related services, which may be referred to as "open market" items or "non-contracted items". For example, you may supply such items "at cost" or "at cost plus a percentage," or you may supply a quote for each such request.	N/A	*
74	Identify any element of the total cost of acquisition that is NOT included in the pricing submitted with your response. This includes all additional charges associated with a purchase that are not directly identified as freight or shipping charges. For example, list costs for items like pre-delivery inspection, installation, set up, mandatory training, or initial inspection. Identify any parties that impose such costs and their relationship to the Proposer.	N/A	*
75	Specifically describe any self-audit process or program that you plan to employ to verify compliance with your proposed agreement with Sourcewell. This process includes ensuring that Sourcewell participating entities obtain the proper pricing.	Acrisure has dedicated Accounting, Finance, and Audit teams. We will set up a separate tracking code and provide records and documents related to all Sourcewell member transactions.	*
76	If you are awarded an agreement, provide a few examples of internal metrics that will be tracked to measure whether you are having success with the agreement.	Acrisure's quality control program uses surveys and feedback models to ensure client success and engagement. In addition, client advisors and service team members will monitor each client to ensure expectations are met.	*
77	Does your organization agree to disclose all fees, commissions, and other forms of revenue generated by serving public sector clients?	Yes, as required by state regulations.	

78	Does your firm assist public agencies with state specific discount programs?	N/A.	
79	Provide an example of fee or commission disclosure documents provided to your clients.	Acrisure does not charge fees or commissions for hourly services. For standard insurance products, the commissions and fees are disclosed in a service agreement and vary by product.	
80	Provide a proposed Administration Fee payable to Sourcewell. THE PROPOSED ADMINISTRATION FEE SHALL NOT BE CONSIDERED COMMISSIONS AND SHOULD NOT BE PAID TO SOURCEWELL AS COMMISSIONS. Proposers awarded a master agreement are expected to pay to Sourcewell an administrative fee in exchange for Sourcewell facilitating the resulting master agreements. Sourcewell does not solicit insurance products and services on behalf of awarded suppliers. The solicitation, placement, and servicing of insurance remains the role of awarded suppliers and their distribution channels. Therefore, the proposed administration fee shall not be considered commissions and should not be paid to Sourcewell as commissions. The administrative fee is normally calculated as a percentage of the total sales to Participating Entities for all products or services made during a calendar quarter and is typically one percent (1%) to two percent (2%). Sourcewell is open to multiple structures that may include flat fee per transaction or percentage of total sales volume and this is purposed in the questionnaire portal of your RFP response.	Acrisure will provide Sourcewell an administrative fee of 1.5% based on total billing (net of chargebacks, refunds, taxes, and additional fees (not charged directly by us) based on our services provided using the pricing model disclosed in the attachment provided and referenced in our response to Question #70.	*

Table 6B: Pricing Offered

Line Item	The Pricing Offered in this Proposal is: *	Comments	
81	The pricing offered is as good as or better than pricing typically offered through existing cooperative contracts, state contracts, or agencies.	Please refer to the attachment titled "Acrisure Tiered Pricing Model for Sourcewell" included in the documents section of our response via the portal.	*

Table 7A: Depth and Breadth of Offered Solutions (125 Points, applies to Table 7A and 7B)

Line Item	Question	Response *	
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82	Provide a detailed description of all the Solutions offered offered in the proposal.	<p>Risk Management: Acrisure provides comprehensive risk management solutions designed to identify, evaluate, and mitigate potential risks to your organization. Our team of experts utilizes advanced analytical tools and industry insights to develop tailored risk management strategies. These include:</p> <ul style="list-style-type: none"> • Risk Assessment: Conducting thorough evaluations to identify potential risks and vulnerabilities. • Risk Mitigation: Implementing strategies to minimize identified risks, including safety protocols, compliance programs, and loss control measures. • Claims Management: Offering support throughout the claims process to ensure efficient and effective resolution. • Training and Education: Providing training programs to enhance risk awareness and promote a culture of safety within your organization. <p>Employee Benefits: Our employee benefits solutions are crafted to attract, retain, and engage top talent while managing costs effectively. Acrisure's offerings include:</p> <ul style="list-style-type: none"> • Health and Wellness Programs: Customizable health plans and wellness initiatives to support employee well-being. • Retirement Planning: Comprehensive retirement solutions, including 401(k) and pension plans, to secure employees' future. • Voluntary Benefits: A range of additional benefits such as dental, vision, life, and disability insurance to meet diverse employee needs. • Benefits Administration: Streamlined administration services to simplify enrollment, communication, and compliance. <p>Insurance Consulting Services: Acrisure's insurance consulting services are designed to provide expert guidance and innovative solutions to meet your organization's unique insurance needs. Our consulting services include:</p> <ul style="list-style-type: none"> • Policy Review and Analysis: Comprehensive review of existing policies to identify gaps and recommend improvements. • Strategic Planning: Developing and implementing strategic insurance plans tailored to your business objectives. • Market Analysis: Conducting market research to identify the best insurance products and providers for your needs. • Compliance and Regulatory Support: Ensuring your organization remains compliant with industry regulations and standards. <p>At Acrisure, we are committed to delivering exceptional service and innovative solutions to help your organization thrive. Our team of dedicated professionals works closely with you to understand your unique challenges and develop customized strategies that drive success.</p>	*
83	Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.	<p>As outlined in our responses to Table 7B, Acrisure is fully equipped to provide solutions for all services in scope as part of this RFP.</p> <ol style="list-style-type: none"> Insurance Policy Placement along with solicitations; Comprehensive Risk Analysis; Claims Prevention and Mitigation; Incident Response and Recovery; Worker's Compensation Safety Programs; Regulatory Compliance and Governance; Technology and Data Analytics Integration; and Strategic Risk Advisory Services. 	*

84	Describe in detail the full complement of risk management services your organization offers to the public sector. Including but not limited to property/casualty, employee benefit, population health management, or community risk management exposures.	<p>Acrisure offers a variety of risk management services for the public sector which we aim to tailor to each individual organization. Here's a detailed overview of our offerings:</p> <ul style="list-style-type: none"> • Risk Analysis and Assessment: Our Risk Advisors have the ability to conduct in-depth evaluations of potential safety risks, allowing public sector entities to understand their unique exposures and develop strategies to mitigate them. • Compliance Support: We assist clients in navigating the complexities of OSHA and DOT compliance, ensuring adherence to relevant regulations and standards. • Safety Training and Resources: Through our Safety Source program, we provide access to over 600 training videos and materials that cover various safety topics, helping organizations reduce workplace injuries and accidents. • Emergency Preparedness: With our close vendor partners, we can assist in developing and implementing emergency response plans tailored to the specific needs of public sector entities, ensuring they are well-prepared for unforeseen crises. • Workforce Reintegration Programs: We offer strategies for successfully reintegrating injured workers into the workplace, enhancing productivity and supporting employee recovery. • Loss Run Analysis: Leveraging our Loss Run Analysis services, we analyze historical loss data to help public sector organizations understand trends and make informed decisions regarding risk mitigation strategies. • Training and Educational Opportunities: Our Acrisure Municipality Webinar Series offers a range of webinars on critical topics such as cybersecurity, OSHA inspections, and fleet safety, providing public sector organizations with valuable knowledge and tools to enhance their risk management efforts. • Utilize the Acrisure Help Desk: Acrisure clients gain access directly to Risk Resources Advisors to help assist with any questions they may have concerning the safety of their organization. • Onsite Site Assessment and Training: Risk Advisors can meet you on site to get a better understanding of your organizations risks firsthand. We also offer select in-person trainings to educate your work force with a hands-on approach. <p>In conclusion, Acrisure is committed to empowering public sector entities through a robust suite of risk management services. Our approach combines expertise, tailored solutions, and innovative training resources to help clients effectively manage risks, safeguard their operations, and enhance community safety.</p> <p>Please refer to the attachments provided titled "Acrisure Risk Resources Overview" and "Acrisure Safety Source Overview" for additional information.</p>
85	What customer service standards can public agencies expect from your organization?	<p>Response Time SLA:</p> <ul style="list-style-type: none"> • Initial Acknowledgment: Our goal is to respond to any employee inquiry within 24 business hours, ensuring that your employees feel heard and valued from the moment they reach out. • Case Resolution Trend: Aligning with our metrics of case resolution trends, our goal is to close the average inquiry case within 3-5 business days. This benchmark is continuously evaluated against peer performance to ensure competitiveness and efficiency. <p>Resolution Quality SLA:</p> <ul style="list-style-type: none"> • First Contact Resolution (FCR): We aim for a high FCR rate, striving to resolve at least 80% of inquiries during the first interaction. This objective is facilitated by our extensive training and the empowerment of our service team to make immediate decisions. • Complex Case Handling: For more complex cases requiring detailed investigation or third-party intervention (e.g., claims disputes, eligibility issues), we commit to providing a resolution or a substantial status update within 10 business days. <p>Communication and Follow-Up SLA:</p> <ul style="list-style-type: none"> • Regular Updates: In situations where an inquiry cannot be resolved within the initial response period, we will provide regular updates to the employee no less than every 48 hours, ensuring transparency and continuous communication. • Satisfaction Follow-Up: Upon the resolution of any case, we will request employee feedback. This insight helps us refine and enhance our service delivery continuously.
86	What reports do you provide your Public Entities and with what frequency?	<p>Acrisure is committed to providing comprehensive and timely reports to our Public Entity clients to ensure transparency, accountability, and informed decision-making. Our standard reports include Risk Management Reports, which analyze risk exposures, mitigation strategies, and claims management updates; Employee Benefits Reviews, offering overviews of benefits utilization, cost analysis, and recommendations for plan adjustments; Monthly Compliance and Regulatory Updates, detailing the latest compliance requirements, regulatory changes, and their potential impact on clients; and Customized Ad Hoc Reports, providing specific analysis and data requested by the client to address unique needs or emerging issues. We will work with Sourcwell and its participating entities to determine the appropriate cadence for these reports, but generally we can offer Monthly, Quarterly, and Annual options depending on the data needed.</p>

87	What inspection or other consulting services to you offer internally or by a 3rd party?	Acrisure's internal team provides a range of consulting and inspection services including risk assessments, loss control evaluations, compliance audits, and more. In addition to our in-house capabilities, we maintain strategic partnerships with a network of reputable third-party service providers. These partners extend our reach and expertise, allowing us to offer specialized services such as detailed property inspections, environmental assessments, cybersecurity evaluations, and more. By leveraging these external resources, we ensure that our clients have access to the highest level of expertise and the latest industry standards.
88	What educational programs or services do you offer specifically for Public Sector?	<p>Acrisure is committed to supporting the ongoing professional development of our clients. We understand the importance of staying up to date with industry trends and best practices to effectively navigate the ever-changing insurance and risk management landscape.</p> <p>To ensure our clients have access to the latest knowledge and expertise, we offer a comprehensive range of resources and support. One key aspect of our approach is providing regular check-in meetings with our clients. These meetings serve as an opportunity to discuss any updates or changes in the industry that may impact their businesses. We also use these meetings to provide status updates on any ongoing projects or action items, ensuring that our clients are well-informed and involved in the decision-making process.</p> <p>In addition to these check-in meetings, we actively encourage our clients to participate in partner and vendor meetings. These meetings allow our clients to stay informed about the resources and solutions available to them. By staying on top of the latest offerings from our network of vendors, our clients can make informed decisions that align with their business goals and objectives.</p> <p>We also invest in continuous learning and professional development opportunities for our people, such as attending webinars, workshops, or training sessions related to employee benefits. This allows your organization to stay updated on new regulations, technologies, and emerging practices. Additionally, we regularly host industry-leading webinars and educational updates for our clients, like our annual Acrisure HR Leaders Compliance Summit, which features well known thought leaders and industry experts.</p>
89	How do you stay current with Public Entities needs?	At Acrisure we have a dedicated compliance team that stays updated on the latest regulations, laws, and industry standards. This team ensures that the company and its employees are aware of any changes and updates in compliance requirements.
90	What is your process to identify and correct any challenges Public Entities have with your agency or staff?	Acrisure is dedicated to maintaining strong relationships with our clients by conducting regular check-ins and ensuring open lines of communication. We assign dedicated account managers to provide personalized support and promptly address any concerns or challenges.
91	Describe the various claims management services, protocols that your organization would make available for public agencies.	Acrisure offers a comprehensive suite of claims management services and protocols tailored to meet the needs of our clients. Our goal is to ensure that claims are handled efficiently and effectively, minimizing disruptions and financial impacts. Our services include claims reporting, dedicated claims handling support, and thorough claim investigations to validate claims and prevent fraud. Additionally, we provide detailed risk assessments, loss control services, and regulatory guidance to ensure compliance with local, state, and federal regulations.
92	Describe any technology made available to public sector clients.	<p>We are dedicated to delivering the best technology and risk solutions tailored to Sourcewell's specific needs and goals. Please see below for an overview of the tools and systems we offer:</p> <p>Auris: Our proprietary software system, Auris internal, analyzes individual policies and suggests alternative markets based on a comprehensive database of our existing customers.</p> <p>This ensures you receive the most competitive and suitable options.</p> <p>CSR24: This interactive portal provides easy access to certificates, policies, change requests, and claims information, allowing for seamless management of your insurance needs.</p> <p>Catastrophic Risk Assessment: We offer an in-depth analysis of client's exposures and potential vulnerabilities, providing a detailed overview of the risks you may face.</p> <p>Acrisure Cyber Solutions: We custom design Cyber, Crime and Technology solutions for our clients worldwide, ensuring robust protection against a wide range of cyber threats.</p> <p>Proprietary Analytics Tools: We utilize advanced proprietary analytics tools to provide industry-specific insights and detailed risk assessments.</p>

93	Describe your account services department.	<p>At Acrisure, we understand that each client has unique needs and objectives, and we are committed to assembling highly specialized account teams tailored to those specific requirements. Our approach begins with a comprehensive evaluation of the client's business, industry, and strategic goals. This detailed assessment allows us to identify the key areas where our expertise can add the most value.</p> <p>Based on this evaluation, we will assemble a dedicated account team composed of professionals with the relevant experience and skillsets to address the client's particular needs. This team will typically include an Account Executive who will serve as the primary point of contact, ensuring seamless communication and coordination across all service areas. Additionally, the team will include specialists in policy management, claims support, risk management, and consulting, each bringing a wealth of knowledge and a track record of success in their respective fields.</p>
94	What is your process for ensuring customer satisfaction?	<p>We prioritize client satisfaction as a measure of our dedication to success. Our primary objective is to address any concerns our clients may have promptly, fostering a genuine partnership. Additionally, we will schedule monthly meetings to ensure we stay on track with any outstanding items. Each meeting will include a relationship/service check-in, giving you the opportunity to provide feedback on our service levels and expectations. We will use this feedback to gauge our performance and make necessary adjustments. A successful relationship is characterized by a set of fundamental attributes, each playing a pivotal role.</p> <ol style="list-style-type: none"> 1. Effective communication is paramount, ensuring alignment and collaborative efficiency. 2. A strong foundation rests on trust and respect, fostering mutual appreciation and reliability. 3. The key elements of understanding and empathy are crucial, allowing for the recognition and appreciation of each other's perspectives and needs 4. Additionally, the art of compromise becomes essential, facilitating the discovery of solutions that benefit both parties and sustain a healthy give-and-take dynamic. <p>We want to be viewed as an extension of your team, ensuring a collaborative and seamless experience. Our proactive approach ensures that we are constantly thinking about your needs, even when you are not actively engaging with us.</p>
95	What kind of training (industry, internal, computer, other) does your staff receive?	<p>Education and training are important to Acrisure. We provide all employees with educational assistance to pursue education and training that upgrades ability and aptitude, enables team members to effectively use acquired skills and accumulated knowledge, and ensures employees' skills outpace industry demand and standards. Acrisure conducts regular training needs assessments to identify the specific areas where our team requires training. We have a robust learning management system (LMS) in place that allows easy access to training materials, tracks progress and provides certifications upon completion.</p> <p>We regularly collaborate with subject matter experts within our organization and even engage external experts to deliver specialized training sessions, ensuring our team receives up-to-date and industry-relevant knowledge.</p> <p>Acrisure is committed to compliance and regulatory training, ensuring that our team remains at the forefront of the latest regulations, laws, and industry standards through regular training sessions and certifications. Feedback from our team regarding the effectiveness of the training programs is encouraged, and this feedback is used to continually improve and refine our training process.</p>
96	How can you assist in facilitating employee meetings?	<p>From an employee benefits perspective, Acrisure can conduct on-site open enrollment meetings, where our experienced professionals guide employees through the enrollment process and address any questions or concerns they may have. Additionally, we provide webinars that can be recorded and posted on your employee benefit website, allowing employees to access the information at their convenience. Furthermore, we understand the value of carrier presentations and their impact on employee understanding and engagement. As part of our services, we coordinate carrier presentations, ensuring that your employees can interact directly with the providers of their benefits. Additionally, we organize ongoing employee education meetings, where employees can learn more about their benefits and how to best utilize their plans throughout the year.</p>
97	How do you assist in facilitating employee meetings regarding solutions in your proposal?	Please refer to the above response to Question #96.

98	What resources do you use to analyze and file medical and pharmacy claims?	<p>Our Health Informatics and Population Health Management team utilizes advanced claim analytics technology, including the use of Springbuk, to analyze client's medical and prescription drug claims. This allows us to identify key areas for improvement in clinical outcomes and cost containment. We leverage state-of-the-art predictive modeling and forecasting tools, incorporating machine learning and AI capabilities, to provide unparalleled accuracy and clarity in our data analysis.</p> <p>To further enhance our analysis, we have licensed clinical nurses on our team who can identify ongoing liabilities in high-cost claimants. This unique approach allows us to not only perform predictive modeling and analysis on your claims but also provide insights from a clinical perspective. By combining financial forecasting, which has been validated by the Regenstrief Institute, with clinical expertise, we can offer comprehensive recommendations to manage your programs effectively.</p> <p>Our reporting services suite includes plan utilization/transparency reporting and financial forecasting. These reports are fully customized to meet your specific needs and can support any ad hoc reporting requests you may have. Once we have access to data from the carriers, our Health Informatics division provides a wide range of analytical reporting. Our team performs clinical data analysis and acts as checks and balances against the insurer's data, ensuring the accuracy and reliability of the information provided.</p> <p>Through our analysis of insurers' medical and pharmacy claims data, we can project future trends based on historical data. This enables us to develop wellness programs and health intervention strategies tailored to the specific conditions in your population. We continuously monitor the impact of these programs and strategies on medical claims over time, allowing us to make adjustments as needed.</p> <p>In addition to identifying gaps in care early on and developing wellness programs, we also assist in adjusting plan designs to drive desired behavior and provide education and information about prevalent conditions to employees. Our comprehensive analysis of claims data includes various components such as month-by-month paid and incurred claims, actual to expected ratios, large claims analysis, clinical analysis and segmentation of claims data, future cost projections and forecasts, claims exceeding specific levels, lag reports, year-over-year utilization statistics, disease management compliance reports, and predictive modeling and financial reporting.</p> <p>With our expertise and the utilization of advanced claim analytics technology, we are well equipped to help manage your programs effectively by providing actionable insights, improving health outcomes, and containing costs.</p>
99	Will your organization complete a provider analysis of physicians, clinics and hospitals that treat our plan participants?	<p>In line with our comprehensive scope of services, we conduct thorough analyses of physicians, clinics, and hospitals that treat your plan participants. Our approach ensures that the providers in your network are not only top-tier in terms of quality but also accessible to all employees, including BIPOC & LGBTQ+ individuals, aligning with our commitment to inclusivity.</p>

100	What resources do you have available to help public sector client's manage benefits and outline a benefits strategy consistent with current and future business plans?	<p>To effectively manage your benefits and devise a strategy that aligns with both current and future business plans, our organization offers a comprehensive suite of resources designed to support and enhance your benefits management process.</p> <p>Our dedicated HR consultants provide personalized, one-on-one support to address specific HR questions, offer guidance, and assist in the development of a strategic benefits plan that aligns with your business objectives. This personalized approach ensures that your unique needs and challenges are met with expert advice and solutions tailored to your organization.</p> <p>In addition to individual support, we offer group training sessions and a wealth of online resources aimed at educating your staff on best practices in benefits administration and strategy development. These sessions are designed to empower your HR team with the knowledge and skills required to effectively manage your benefits program.</p> <p>Recognizing the importance of staying informed on legislative changes and industry trends, we host an annual HR Leaders Compliance Summit. This 3-day event brings together thought leaders and industry experts to discuss current trends, legislative updates, and innovative strategies in benefits management. This summit provides a valuable opportunity for professional development and insight into future trends that may impact your benefits strategy.</p> <p>Our comprehensive HR newsletters and compliance updates are another key resource, offering timely bulletins, and webinars that keep you informed on the latest in legislative changes, market developments, and best practices. This ensures that your benefits strategy remains compliant and with the latest industry standards. Furthermore, our HR consulting and compliance advantage leverages the expertise of our team to ensure your benefits strategy not only meets current regulatory requirements but is also positioned to adapt to future changes in the landscape. Our proactive approach to HR consulting and compliance support simplifies the complexity of benefits management, allowing you to focus on strategic business objectives.</p>
101	How can you help governments develop cost projections tied to their fiscal goals?	<p>To assist in developing cost projections tied to your fiscal goals, we will utilize our best-in-class data analytic tools (ie. SpringBuk), to measure plan performance, adherence to budget, and identify areas of potential overspend. This will include a detailed review of claims data, healthcare utilization patterns, and employee demographics to assess risks and opportunities for cost containment. Our data analytics capabilities will also allow us to benchmark your programs against industry competitors, providing a clearer picture of how your spending compares and where adjustments can be made for efficiency and effectiveness.</p> <p>Incorporating alternative funding strategies is another cornerstone of our methodology. We specialize in advising on and implementing strategies such as self-funding which can offer more control over costs and enhanced flexibility in plan design. By exploring these and other funding options, we aim to uncover opportunities for significant cost savings while maintaining or improving benefits coverage for your employees.</p> <p>We are dedicated to working closely with you to ensure that our cost projection models are not only accurate and reliable but also fully aligned with your organization's fiscal objectives and long-term strategic vision.</p>

102	How will you help with the management of insurance, including: monthly (or quarterly) supervision and/or preparation of claims activity reports from carriers; executive summary reports; underwriting analysis for annual renewals; annual financial projections for budgeting purposes; and alternative funding analyses?	<p>In line with Acrisure's comprehensive approach to employee benefits management, we are committed to offering an extensive range of services to assist with the management of insurance. This encompasses supervision and/or preparation of claims activity reports from carriers, executive summary reports, underwriting analysis for annual renewals, annual financial projections for budgeting purposes, and alternative funding analyses.</p> <p>Supervision and Preparation of Claims Activity Reports: Our dedicated team utilizes a CRM system, specifically tailored to group employee benefits management, to track all claims activity. This system enables us to automate the monitoring of claims, ensuring timely preparation and supervision of detailed claims activity reports.</p> <p>Executive Summary Reports: To complement the detailed claims activity reports, our team prepares executive summary reports. These reports provide a high-level overview of the key metrics and trends in your insurance program, highlighting areas of success and opportunities for improvement.</p> <p>Underwriting Analysis for Annual Renewals: Our in-house underwriting team plays a vital role in the annual renewal process. By conducting detailed underwriting analyses, we scrutinize the financial components of your insurance program. This involves a thorough review of carrier proposals, leveraging our extensive market knowledge and negotiation skills to secure the best possible terms.</p> <p>Annual Financial Projections for Budgeting Purposes: Understanding the importance of financial planning, our team provides annual financial projections to aid in your budgeting process. This includes independently verified risk modeling and data analytics to inform plan design and budget decisions.</p> <p>Alternative Funding Analyses: In our pursuit to offer cost-effective insurance solutions, we conduct alternative funding analyses. This involves evaluating various funding mechanisms outside of traditional fully-insured plans, such as self-funding, level funding, or captive arrangements. Our analysis considers your organization's risk tolerance, financial objectives, and unique needs to identify the most advantageous funding strategy.</p> <p>By aligning our services with your organizational goals, we aim to deliver a bespoke benefits program that is market competitive, inclusive, cost-effective, user-friendly, and compliant.</p>
103	How does your firm stay current with state regulations that impact multi-state employers?	<p>At Acrisure, we have extensive experience working with clients who have multiple locations and operate in various states. We understand the complexities that come with managing employee benefits across different locations and jurisdictions.</p> <p>With our licensing in all states, we are well-equipped to navigate the regulatory landscape and ensure compliance with state-specific requirements. Whether your organization has two locations or twenty, we have the expertise to provide seamless support and deliver consistent benefits solutions.</p> <p>We also have a network of trusted partners and resources in different regions. This enables us to provide localized support and address any location-specific needs that may arise.</p>

104	Will your firm notify your client of changes in federal and/or local laws that would affect us?	<p>Yes. We understand the importance of keeping our clients informed and up to date on the latest developments in the industry. We employ a multi-faceted approach to ensure our clients are well-informed. Acrisure regularly sends out compliance email bulletins to our clients. These bulletins outline new Federal, State, and local legislation and regulations that may impact their business. Our goal is to provide timely and relevant information that can help our clients stay compliant and make informed decisions.</p> <p>In addition to the email bulletins, our dedicated service team proactively reaches out to clients to provide personalized support and guidance. Our team helps interpret and fulfill compliance requirements, ensuring that our clients are aware of any pending or new legislation that may affect their operations.</p> <p>To further enhance our clients' knowledge and understanding, we organize annual in-person compliance seminars and compliance webinars throughout the year. These events offer valuable opportunities for our clients to deepen their understanding of the regulatory landscape and stay ahead of any changes.</p> <p>Furthermore, we provide access to a designated HR compliance expert who is available to answer any questions and offer guidance on compliance matters. Additionally, our clients have access to Mineral (formerly ThinkHR) a comprehensive HR compliance resource, as well as a library of forms and templates to assist them in meeting their compliance obligations.</p> <p>By employing this comprehensive approach, we ensure that our clients are kept up to date with the latest industry developments and compliance requirements.</p>
105	Explain what steps you have taken to become HIPAA compliant.	<p>We view privacy and data security with the utmost importance and has put in place a privacy and data security programs that, at a minimum, are aimed at complying with applicable laws and regulations, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA) (as amended).</p> <p>We also comply with state insurance laws and regulations applicable to insurance producers; various federal laws applicable to financial institutions such as insurance producers; various privacy and data security laws applicable to property-casualty insurance, life insurance and employee benefits, including, but not limited to, GLBA, HIPAA, CCPA, NYDFS Cybersecurity Regulation, and GDPR; and various other state and federal laws and regulations applicable to the sale of property-casualty insurance, life insurance, and employee benefits to personal and commercial customers, as applicable.</p>
106	What is your process for measuring the success or failure of a wellness program?	<p>Our process for measuring the success or failure of a wellness program is multifaceted and data driven. We work with our clients to establish clear, measurable goals aligned with their objectives, such as improving employee health outcomes, reducing healthcare costs, and increasing employee engagement and productivity. We utilize health risk assessments, biometric screenings, and wellness surveys to gather baseline data and track progress over time. Additionally, we analyze healthcare claims data to identify trends and assess the impact of the wellness initiatives on medical costs. Our robust analytics platform allows us to generate detailed reports that provide a comprehensive view of the program's performance, enabling our clients to make informed decisions and continuously enhance their wellness strategies. By integrating these various data points, we ensure a holistic evaluation of the wellness program's success and areas for improvement.</p>
107	Describe how you keep your clients abreast of employment laws in a timely manner.	<p>Acrisure employs various methods to communicate and educate our clients on pending new laws, regulations, and timelines for required changes.</p> <ul style="list-style-type: none"> • Newsletters and Publications: Acrisure publishes weekly digests, monthly briefs, and legislative bulletins that are informational materials distributed to clients. These materials can include updates on new laws or regulations, along with explanations and guidance on how clients can comply with the changes. We also provide insights into the potential implications and opportunities arising from the new requirements. • Webinars and Seminars: Acrisure offers monthly webinars specifically tailored to educate clients about pending new laws, regulations, and required changes. These events can provide a platform for clients to ask questions, engage in discussions, and gain a deeper understanding of the implications and steps required for compliance. • Direct Follow-Up: Our team follows up with Sourcewell relative to pending new laws, regulations, and timelines to ensure compliance with required changes. • Compliance Dashboard: We customize a robust checklist and calendar that houses all your required employee notices and due dates for mandatory reporting applicable to your group size and benefit offerings. When onboard, clients have access to the dashboard, which is continuously updated by our team, to reference as needed. This is a valuable tool that helps our clients ensure they are meeting compliance requirements and deadlines. • Benefits Compliance Booklet: Customized to your team and plan offerings, we create a benefit booklet that encompasses all key federal compliance and annual notices, ensuring you have all necessary information in one document for distribution.

108	What types of materials can you provide to communicate pertinent information to client's employees?	Our internal creative marketing department, comprised of talented professionals, oversees the design and development of our employee communication materials. We offer a wide array of resources, including benefits booklets, fliers, brochures, and other printed materials. These materials are thoughtfully crafted to convey information in a visually appealing and engaging manner, ensuring that your employees are motivated to explore and understand their benefits. In addition to printed materials, we also offer a customized benefits website that is built by our in-house web designers. This website serves as a central hub of information, providing employees with easy access to important documents, FAQs, and other resources. Our team will work closely with you to create a website that aligns with your organization's branding and meets the specific needs of your employees.
109	What provisions do you offer for after-hours claims support?	Your employees have access to Acrisure Client Advocates 24 hours a day, 7 days a week, 365 days a year. We know life doesn't just happen between 8 a.m. and 5 p.m., so we are here for you, your HR team, your leadership team, your employees, and their dependents, when it is convenient for you and them.
110	How does your firm assist in analyzing NCCI EMOD calculations?	Acrisure client advisors review and analyze experience modifiers with clients regularly. We also prepare experience modifier projections for clients so that they understand how their loss trends may impact future years. We work with client to understand the underlying loss trends and develop strategies and solutions to address and improve upon loss experience.
111	Explain how your firm assists with proactive budgetary projections prior to policy renewal?	Understanding the importance of financial planning, our team provides annual financial projections to aid in your budgeting process. This includes independently verified risk modeling and data analytics to inform plan design and budget decisions.
112	What services does your firm provide for audit assistance?	Acrisure works with clients on their regulatory compliance performance (i.e., OSHA; DOT). Upon request, we will perform mock compliance audits to look for areas to improve. We will identify trends or incidents that are more likely to trigger a compliance audit. If a client undergoes a formal compliance audit, we can provide or arrange for audit support and post-audit action plans. We believe the best approach is proactive, helping our clients understand compliance requirements so that they can be audit-ready.
113	Provide an example of how your firm has helped a Public Sector Entity with claims management?	Please refer to the attachment titled "Acrisure Public Entity Success Stories."
114	Provide an example of how your firm has helped a public entity to save money Workers Compensation?	<p>In managing workers compensation, we help our clients achieve significant savings through effective claims management, robust return-to-work programs, and comprehensive safety measures. By leveraging the experience modification factor (mod) and state-certified safety programs (particularly in Colorado), additional discounts can be secured.</p> <p>When engaging with new clients, our advisors initiate a thorough risk analysis to identify strengths and areas for improvement. This includes ensuring accurate payroll classification, which can yield considerable cost savings. They begin by reviewing the client's loss history to discern any patterns and conduct a Mod Master analysis to determine if adjusting the deductible could exclude some claims from the mod calculation.</p> <p>Collaboration with clients is key. Together, we refine their safety program and establish a safety committee to uphold high standards. Throughout the claims process, we maintain regular communication with adjusters and medical professionals to spot potential red flags and address them promptly. For instance, our client advisors have identified cases where employees were compensated for lost wages despite being at work.</p> <p>A critical component of our strategy involves return-to-work initiatives. By facilitating modified duty for employees, we significantly reduce the overall claim costs, which positively impacts the experience mod and, consequently, the insurance premium.</p> <p>Our work is driven by a commitment to client service and process improvement, ensuring that our collaborative efforts lead to enhanced operational efficiency, reduced loss ratios, and ultimately, substantial cost savings for the client.</p> <p>Please refer to the attachment titled "Acrisure Full Service Roadmap" for additional information. We've also included an attachment titled "Acrisure Sample Risk Assessment" for your review.</p>

Table 78: Depth and Breadth of Offered Solutions

Indicate below if the listed types or classes of Solutions are offered within your proposal. Provide additional comments in the text box provided, as necessary.

Line Item	Category or Type	Offered *	Comments	
115	Insurance Policy Placement along with solicitations	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes	*
116	Comprehensive Risk Analysis	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes	*
117	Claims Prevention and Mitigation	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes	*
118	Incident Response and Recovery	<input checked="" type="radio"/> Yes <input type="radio"/> No	Acrisure can provide Incident Response and Recovery solutions. However, we welcome the opportunity to learn more about the specific needs of Sourcewell's participating entities in this area.	*
119	Worker's Compensation Safety Programs	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes	*
120	Regulatory Compliance and Governance	<input checked="" type="radio"/> Yes <input type="radio"/> No		
121	Technology and Data Analytics Integration	<input checked="" type="radio"/> Yes <input type="radio"/> No		
122	Strategic Risk Advisory Services	<input checked="" type="radio"/> Yes <input type="radio"/> No		
123	Northeast which includes Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, and Vermont	<input checked="" type="radio"/> Yes <input type="radio"/> No		
124	Midwest which includes Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin	<input checked="" type="radio"/> Yes <input type="radio"/> No		
125	South which includes Alabama, Arkansas, Delaware, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, Washington, D.C., and West Virginia	<input checked="" type="radio"/> Yes <input type="radio"/> No		
126	West which includes Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, and Wyoming	<input checked="" type="radio"/> Yes <input type="radio"/> No		

Exceptions to Terms, Conditions, or Specifications Form

Only those Proposer Exceptions to Terms, Conditions, or Specifications that have been accepted by Sourcewell have been incorporated into the contract text.

Documents

Ensure your submission document(s) conforms to the following:

1. Documents in PDF format are preferred. Documents in Word, Excel, or compatible formats may also be provided.
2. Documents should NOT have a security password, as Sourcewell may not be able to open the file. It is your sole responsibility to ensure that the uploaded document(s) are not either defective, corrupted or blank and that the documents can be opened and viewed by

Sourcewell.

3. Sourcewell may reject any response where any document(s) cannot be opened and viewed by Sourcewell.

4. If you need to upload more than one (1) document for a single item, you should combine the documents into one zipped file. If the zipped file contains more than one (1) document, ensure each document is named, in relation to the submission format item responding to. For example, if responding to the Marketing Plan category save the document as "Marketing Plan."

- [Pricing](#) - Acrisure Tiered Pricing Model for Sourcewell.pdf - Friday January 17, 2025 13:46:11
- Financial Strength and Stability (optional)
- Marketing Plan/Samples (optional)
- WMBE/MBE/SBE or Related Certificates (optional)
- [Standard Transaction Document Samples](#) - Acrisure Sample Client Services Agreement.pdf - Tuesday January 21, 2025 10:52:01
- [Requested Exceptions](#) - Acrisure Response to Sourcewell Exceptions to Terms, Conditions, or Specifications Form.docx - Thursday January 16, 2025 20:16:47
- [Upload Additional Document](#) - Acrisure Additional Attachments.zip - Tuesday January 21, 2025 11:03:34

Addenda, Terms and Conditions

PROPOSER AFFIDAVIT OF COMPLIANCE

I certify that I am an authorized representative of Proposer and have authority to submit the foregoing Proposal:

1. The Proposer is submitting this Proposal under its full and complete legal name, and the Proposer legally exists in good standing in the jurisdiction of its residence.
2. The Proposer warrants that the information provided in this Proposal is true, correct, and reliable for purposes of evaluation for award.
3. The Proposer certifies that:
 - (1) The prices in this Proposal have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other Proposer or competitor relating to-
 - (i) Those prices;
 - (ii) The intention to submit an offer; or
 - (iii) The methods or factors used to calculate the prices offered.
 - (2) The prices in this Proposal have not been and will not be knowingly disclosed by the Proposer, directly or indirectly, to any other Proposer or competitor before award unless otherwise required by law; and
 - (3) No attempt has been made or will be made by Proposer to induce any other concern to submit or not to submit a Proposal for the purpose of restricting competition.
4. To the best of its knowledge and belief, and except as otherwise disclosed in the Proposal, there are no relevant facts or circumstances which could give rise to an organizational conflict of interest. An organizational conflict of interest is created when a current or prospective supplier is unable to render impartial service to Sourcewell due to the supplier's: a. creation of evaluation criteria during performance of a prior agreement which potentially influences future competitive opportunities to its favor; b. access to nonpublic and material information that may provide for a competitive advantage in a later procurement competition; c. impaired objectivity in providing advice to Sourcewell.
5. Proposer will provide to Sourcewell Participating Entities Solutions in accordance with the terms, conditions, and scope of a resulting master agreement.
6. The Proposer possesses, or will possess all applicable licenses or certifications necessary to deliver Solutions under any resulting master agreement.
7. The Proposer will comply with all applicable provisions of federal, state, and local laws, regulations, rules, and orders.
8. Proposer its employees, agents, and subcontractors are not:
 1. Included on the "Specially Designated Nationals and Blocked Persons" list maintained by the Office of Foreign Assets Control of the United States Department of the Treasury found at: <https://www.treasury.gov/ofac/downloads/sdnlist.pdf>;
 2. Included on the government-wide exclusions lists in the United States System for Award Management found at: <https://sam.gov/SAM/>; or
 3. Presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota; the United States federal government, as applicable; or any Participating Entity. Vendor certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this solicitation.

☒ By checking this box I acknowledge that I am bound by the terms of the Proposer's Affidavit, have the legal authority to submit this Proposal on behalf of the Proposer, and that this electronic acknowledgment has the same legal effect, validity, and enforceability as if I had hand signed the Proposal. This signature will not be denied such legal effect, validity, or enforceability solely because an electronic signature or electronic record was used in its formation. - Danielle Nickelson, Authorized Representative, Acrisure, LLC

The Proposer declares that there is an actual or potential Conflict of Interest relating to the preparation of its submission, and/or the Proposer foresees an actual or potential Conflict of Interest in performing the obligations contemplated in the solicitation proposal.

☒ Yes ☐ No

The Bidder acknowledges and agrees that the addendum/addenda below form part of the Bid Document.

Check the box in the column "I have reviewed this addendum" below to acknowledge each of the addenda.

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
Addendum 9 Risk Management RFP 012125 Tue January 14 2025 08:27 AM	<input checked="" type="checkbox"/>	1
Addendum 8 Risk Management RFP 012125 Fri January 10 2025 12:53 PM	<input checked="" type="checkbox"/>	2
Addendum 7 Risk Management RFP 012125 Thu January 9 2025 10:08 AM	<input checked="" type="checkbox"/>	2
Addendum 6 Risk Management RFP Wed January 8 2025 03:22 PM	<input checked="" type="checkbox"/>	2
Addendum 5 Risk Management RFP Wed January 8 2025 03:22 PM	<input checked="" type="checkbox"/>	1
Addendum 4 Risk Management RFP 012125 Fri December 20 2024 09:34 AM	<input checked="" type="checkbox"/>	1
Addendum 3 Risk Management RFP 012125 Tue December 17 2024 03:39 PM	<input checked="" type="checkbox"/>	2
Addendum 2 Risk Management RFP 012125 Fri December 13 2024 01:06 PM	<input checked="" type="checkbox"/>	2
Addendum 1 Risk Management RFP 012125 Tue December 10 2024 12:42 PM	<input checked="" type="checkbox"/>	1

**AMENDMENT #1
TO
MASTER SERVICES AGREEMENT # 012125-ACS**

THIS AMENDMENT is effective upon the date of the last signature below by and between **Sourcewell** and **Acrisure, LLC** (Supplier).

Sourcewell entered into a Master Services Agreement with Supplier to provide Risk Management, Employee Benefits, and Insurance Consulting Services, effective March 11, 2025, through February 21, 2029 (Agreement).

The parties wish to modify the Agreement.


NOW, THEREFORE, the parties amend the Contract as follows:

1. Article 2, Section 7 of the Agreement is deleted in its entirety and replaced with the following:

7) **Administrative Fee.** In consideration for the support and services provided by Sourcewell, Supplier will pay an Administrative Fee to Sourcewell related to Participating Entities utilizing this Agreement. Supplier will include its Administrative Fee within its proposed pricing. Supplier may not directly charge Participating Entities to offset the Administrative Fee.
2. Article 2, Section 8 of the Agreement is deleted in its entirety and replaced with the following:


8) **Fee Calculation.** Where permitted by applicable law or regulation, Supplier's Administrative Fee payable to Sourcewell shall be a flat fee of One Thousand Five Hundred Dollars (\$1,500.00) annually or other amount mutually agreed upon by the parties on a semi-annual basis or other period of time approved by both parties. The Administrative Fee is payable in monthly installments in arrears and in accordance with the terms of this Agreement. The Parties agree that any compensation paid to Supplier pursuant to this Section will not be conditioned or contingent upon the purchase of insurance by any Participating Entities, or based on the sale, solicitation or negotiation of insurance in any respect.

Except as amended, the Agreement remains in full force and effect.

Sou Signed by:

By: C0FD2A139D06489...

Jeremy Schwartz, Chief Procurement Officer

Date: 6/17/2025 | 11:21 AM CDT

Acr Signed by:

By: C8890A5B71834D8...

Ryan G. Foley, Executive Vice President

Date: 6/20/2025 | 9:57 AM CDT
