



**COMMENT AND REVIEW
to the
REQUEST FOR PROPOSAL (RFP) # 012125
Entitled**

Risk Management, Employee Benefits, and Insurance Consulting Services

The following advertisement was placed December 3 and December 10, 2024 in *USA Today* and in Oklahoma's *The Oklahoman*; December 4, 2024 in South Carolina's *The State*; December 3, 2024 on the Sourcewell website www.sourcewell-mn.gov, Sourcewell Procurement Portal <https://proportal.sourcewell-mn.gov>; December 3, 2024 on Biddingo; December 3, 2024 on PublicPurchase.com; December 3, 2024 on The New York State Contract Reporter www.nyscr.ny.gov; December 4, 2024 in Oregon's *Daily Journal of Commerce*; December 3, 2024 in Utah's *The Salt Lake Tribune*; and December 4, 2024 in Utah's *Deseret News*:

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for Risk Management, Employee Benefits, and Insurance Consulting Services to result in a procurement solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [https://proportal.sourcewell-mn.gov]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than January 21, 2025, at 4:30 p.m. Central Time, and late proposals will not be considered.

The solicitation process was conducted through the Sourcewell Procurement Portal. The following parties expressed interest in the solicitation by registering for this opportunity within the portal:

Acrisure	Keverest Technologies
Acuity Risk Consultants, Inc.	LGAA, LLC
AlliConnect	Lockton
Alliant Insurance Services, Inc.	Mahati Systems, Inc.
AMWINS Health and Employee Benefits Consulting	McGriff Insurance Services, a Marsh & McLennan Agency LLC Company
Aon Consulting, Inc.	NetSecure LLC
Associates Insurance Group	NXT Level Technologies, LLC
BDO Canada LLP	Partners in Care Insurance Group
Broadway Ford Truck Sales Inc.	Personal Growth Network Companies LLC

Camvie Services LLC	PPI
Castlestone Advisors LLC	Progyny
Colonial Life & Accident Insurance Company	PWXPress
Consumer Capital Group	Reclaim Health
EG Bowman Co. Inc.	Sure Shot Termite & Pest Control Inc.
Gallagher	The McNeil Agency
Growth Capital Management LLC	Total Administrative Services Corporation
I.Y.B. Consultants LLC	Turner Surety and Insurance Brokerage, Inc.
IMA, Inc.	Unified Software Solutions
Indigo Blue Construction, LLC	USI Insurance Services
Integer Health Technologies, LLC	Washington United LLC
Integrity Employee Benefits	WHA Insurance Agency, LLC.
Johns Storage	Wumbis Concept Inc

All Proposals remained sealed within the Sourcewell Procurement Portal until the scheduled due date and time. Proposals were electronically opened, and the list of all Proposers was made publicly available on the Sourcewell Procurement Portal, on January 21, 2025 at 4:30 pm CT. Proposals were received from the following:

Acrisure
 Alli Connect
 Alliant Insurance Services
 AMWINS Health and Employee Benefits Consulting
 Aon Consulting, Inc.
 Camvie Services LLC
 Consumer Capital Group
 Gallagher
 Integer Health Technologies, LLC
 Integrity Employee Benefits
 LGAA, LLC
 WHA Insurance Agency, LLC.

Proposals were reviewed by the Proposal Evaluation Committee:

Ginger Line, MPA, NIGP-CPP, CPPB Senior Procurement Analyst
 Ben James, Procurement Analyst II
 Ashley Powers, Procurement Analyst I
 David Gonzalez, Procurement Analyst I

The findings of the Proposal Evaluation Committee are summarized as follows:

Acrisure was established in 2005. They are an insurance brokerage firm and act as an intermediary between clients and insurance carriers, leveraging extensive network and market expertise to provide tailored insurance and financial solutions. As an international company that has hundreds of wholly owned companies under its umbrella, 1000 office locations worldwide, and serve all 50 states, they offer all requirements in the scope of work desired. Acrisure is offering a significant discount with a tiered pricing structure.

Alliant Insurance Services was founded in 1925 and were ranked #5 in the 2024 Business Insurer’s 100 Largest Brokers of U.S. With over 130 offices and more than 13,000 employees, they are ready to provide their services to all fifty states. Their services include insurance policy placement, 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. Alliant is offering Sourcewell participating entities a solid discount off standard retail pricing.

Aon Consulting, Inc.’s roots go back more than 100 years. Today, Aon is one of the largest placement brokers in the world, managing nearly \$200 billion of premiums placed per year. Aon currently has more than 10,000 sales professionals and 6,000 service professionals across 70 office locations in the United States. Aon offers all lines of insurance coverage public sector clients may need. Aon’s pricing model includes discounted rates for services and discounted commission for all coverage lines covered under this proposal.

Consumer Capital has a wide range of experience in life and health insurance services, wealth management, and management consultancy over the last 15 years and is licensed in all 50 states. They have 300 licensed and trained agents in over 50 key metropolitan areas in the United States. Their pricing is competitive in the markets they serve. As a small business entity, they are providing insurance policy placement, risk analysis, claims prevention, incident response and worker’s compensation safety programs along with various other solutions for Sourcewell participating agencies.

Gallagher Benefit Services/Arthur J. Gallagher Risk Management Services, LLC, is a global insurance brokerage and risk management services firm. Established in 1927, they now have over 960 offices and over 52,000 employees, worldwide. They are licensed in all fifty states, and are ready to serve Sourcewell participating entities. Their services include insurance policy placement, 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.

WHA Insurance Agency, LLC is based in Eugene, OR, and is best described as an insurance broker, third-party administrator, and consulting agency. WHA Insurance employs a robust network of highly qualified agents, brokers, and consultants who specialize in serving public sector entities, with a particular emphasis on first responders, special districts, and municipalities. WHA is offering aggressive pricing for entities large and small. They are based in the Pacific Northwest, but they maintain the required certification/licensing to work anywhere in the United States.

For these reasons, the following awards of Sourcewell #012125 are recommended:

Acrisure	012125-ACS
Alliant Insurance Services	012125-AIS
Aon Consulting, Inc.	012125-AON
Consumer Capital Group	012125-CNC
Gallagher	012125-GLG
WHA Insurance Agency, LLC	012125-WHA

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Ginger Line, MPA, NIGP-CPP, CPPB Senior Procurement Analyst

Sourcewell

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Ben James

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Ben James, Procurement Analyst II

DocuSigned by:

Ashley Powers

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Ashley Powers, Procurement Analyst I

Signed by:

David Gonzalez

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David Gonzalez, Procurement Analyst I

STATEMENT OF COMPLIANCE

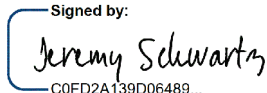
As Chief Procurement Officer for Sourcewell, I have reviewed the recommendation of the Evaluation Committee and the accompanying support materials documenting the process followed for **RFP #012125 for Risk Management, Employee Benefits, and Insurance Consulting Services**.

The committee accepted, deemed responsive, evaluated, and recommended proposals for award. Under authority granted to the Chief Procurement Officer in Sourcewell's bylaws, the recommendations set forth above are approved.

I hereby certify:

1. Sourcewell is a government agency, created and authorized by Minnesota law to provide cooperative procurement master agreements.
2. The procurement process and resulting master agreements have been awarded in compliance with the laws of the State of Minnesota (Minnesota Statutes Chapter 471 and Minnesota Statutes Section 123A.21), and in conformity to Sourcewell's Procurement Policy.
3. The awards listed were made based on the results of the competitive solicitation process.
4. The awards listed were ratified by the Sourcewell Board of Directors on March 24, 2025.

Signed by:

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Jeremy Schwartz, CSSBB, CPPO, NIGP-CPP
Sourcewell Chief Procurement Officer