



CHARTIERS VALLEY
SCHOOL DISTRICT | *Inspiring excellence.*

Request for Proposal

Insurance Brokerage and Risk Management Services

Chartiers Valley School District
2030 Swallow Hill Road
Pittsburgh, PA 15220
Beth Wright
Director of Finance and Operations

All e-mail correspondence should be directed to bwright@cvsd.net

Request for Proposal (“RFP”) Insurance Brokerage and Risk Management Services

I. Preface

The Chartiers Valley School District is soliciting proposals for insurance brokerage and risk management services from brokers with experience implementing insurance services for Pennsylvania school districts. Insurance coverage will be effective as of July 1, 2025. Insurance coverage for this request includes:

- A. Business Auto
- B. Commercial Package – Property (including coverage for earthquake, flood, mine subsidence and earth movement), Commercial General Liability, Crime & Fidelity, and Equipment Breakdown
- C. Cyber Liability
- D. School Leaders
- E. Umbrella Liability
- F. Workers’ Compensation
- G. Student Accident including Student Athletes

The recommended firm will provide services that supports Chartiers Valley School District’s insurance programs, provide risk management services, and represent Chartiers Valley School District in the commercial insurance marketplace.

Insurance brokers are not being asked to submit specific insurance premium quotations at this time, but are being asked to provide commission information as detailed below. Once appointed, the successful broker will be requested to propose policies that include firm quotations for the 12-month coverage period commencing July 1, 2025.

II. RFP Vendor Requirements

The vendor must describe how it will support Chartiers Valley School District’s insurance programs by providing a narrative to the following:

- A. Describe your company’s history and related experience with Pennsylvania school districts that self-operates student transportation services and owns a large fleet of vehicles and is engaged with multiple construction projects.
- B. Describe how your company provides daily services and interaction with a school district. For example, responsiveness to claims, COIs, replies to questions about all aspects of our policies, etc.

- C. Describe your company's systems and/or models used to assess risk management strategies used during our insurance program review and critique.
- D. Describe your company's approach to service specifically in the education market, such as, claims management, experience modifier management, Safety Committee Assistance, cyber risk, etc.
- E. Describe your company's personnel and qualifications with whom the Chartiers Valley School District staff will work. Identify the team members and discuss their role as well as experience and expertise. Biographies of team members should be included in an Addendum to the proposal.
- F. State your proposed commission rate by line of coverage for each line of coverage (Section I, items A-G above).
- G. Provide three (3) client references with names, titles and phone numbers that Chartiers Valley School District may contact. School district references preferred. Two of the three references must be clients of the local office submitting the proposal.

III. Selection Criteria

Response should be written to address the requirements outlined in Section II, RFP Vendor Requirements. Your firm may be invited to an in-person interview.

Responding companies will be selected for further consideration based upon, but not limited to, the following criteria:

- A. Completion of all required sections of RFP
- B. Response to all requirements in reasonable detail
- C. Meeting the deadline for submission of RFP
- D. Quality of the response to the RFP
- E. Overall expertise
- F. Ability to provide cost-effective solutions to meet the needs of the District
- G. Number, quality, and experience of assigned account personnel
- H. Demonstrated exceptional level of customer service and support to similar clients
- I. Amount, nature, appropriateness and clarity of compensation disclosure

Responses are due on March 11, 2025, by 1:00 p.m. EST via email. Email your response to bwright@cvsd.net and insert the following in the subject line: *RFP Insurance Brokerage and Risk Management Services.*