



**Community Council of Greater Dallas
REQUEST FOR PROPOSAL**

ISSUANCE DATE: August 26, 2025

**DELIVERABLES REQUESTED: COMMERCIAL INSURANCE
BROKERAGE**

DEADLINE: September 9, 2025

You are invited to submit a Proposal in accordance with the requirements of the solicitation contained herein. Proposals are to be submitted to Community Council of Greater Dallas (CCGD) and emailed to Procurement@ccadvance.org **no later than 12:00 noon on the deadline date of September 9, 2025.** Your proposal must be signed by an authorized official to bind the offer and must contain a statement that the offer is firm for at least 120 calendar days from the date of submission.

The submitted proposals must show the above proposal title. CCGD assumes no responsibility for unmarked or incorrectly marked envelopes or emails being considered for award.

This solicitation does not commit CCGD to award a contract, to pay any costs incurred in preparing a proposal in response to this request, or to procure our contract for the goods or services. CCGD reserves the right to accept or reject any or all proposals received because of this Request for Proposal (RFP), to negotiate with all qualified offerors, or to cancel in part or in whole this Request if it is in the best interest of CCGD to do so.



**Community Council of Greater Dallas
REQUEST FOR PROPOSAL**

Commercial Insurance Brokerage

PREPARED BY THE
COMMUNITY COUNCIL OF GREATER DALLAS

ISSUANCE DATE: August 26, 2025

**Community Council of Greater Dallas
REQUEST FOR PROPOSAL**

TABLE OF CONTENTS

PART 1:	GENERAL INFORMATION	Page No.
	A. Key Events and Dates	4-5
	B. Delivery of Proposals	4
	C. Policy of Competition	4
PART 2:	SPECIAL INSTRUCTIONS AND CONDITIONS	
	A. Purpose	5
	B. Presentations and Negotiations	5
	C. Open Records	6
	D. Affirmative Action	6
	E. Conflict of Interest and Debarment	6
	F. Consideration for Business Diversity	6
	G. Format for Proposal	6
	H. Contact Award	6
	I. Notice of Award	7
	J. Protest Policy	7
PART 3:	EVALUATION CRITERIA	
	A. Organization Capability and Experience	7-8
	B. Cost Considerations	8
	C. Coverage of Requirements	8
	D. Staff Experience	8
PART 4:	SCOPE OF SERVICES (Please refer to Part 7A for more details)	8
PART 5:	ORGANIZATION OF PROPOSAL DOCUMENTS	8-9
PART 6:	APPEALS	9
PART 7:	ATTACHMENTS:	
	A: SCOPE OF SERVICES ATTACHMENT	10
	B: SUMMARY INFORMATION SHEET	12
	C: NOTIFICATION OF CONFLICT OF INTEREST	13
	D: CONTRACTOR CERTIFICATION	14

Community Council of Greater Dallas
REQUEST FOR PROPOSAL

PART 1: GENERAL INFORMATION

A. Key Events and Dates

1. Commercial Insurance Brokerage
2. Request for Proposals: **Issued on August 26, 2025**
3. Question and Answer **Zoom Meeting: September 2, at 11:30 am**

Michelle Slovak is inviting you to a scheduled Zoom meeting.

Topic: Community Council Information meeting re: Commercial Insurance Brokerage

Time: Sep 2, 2025 11:30 AM Central Time (US and Canada)

Join Zoom Meeting

<https://us02web.zoom.us/j/82910451780?pwd=L5JcLEA3fUGR5aS6lZZvwOY6rymEmc.1>

Meeting ID: 829 1045 1780

Passcode: 847207

One tap mobile

+13462487799,,82910451780#,,, *847207# US (Houston)

+12532050468,,82910451780#,,, *847207# US

Join by SIP

• 82910451780@zoomcrc.com

Join instructions

https://us02web.zoom.us/join/82910451780/invitations?signature=mSbpdTG6-hN5um-qCNVfexuiFjdX_VEHPIAvM1FSGOE

Location

<https://us02web.zoom.us/j/82910451780?pwd=L5JcLEA3fUGR5aS6lZZvwOY6rymEmc.1>

**Community Council of Greater Dallas
REQUEST FOR PROPOSAL**

4. **Deadline** for Receipt of Formal Proposals: **12:00 noon on September 9, 2025**
5. Commencement of Evaluations: **September 9-11, 2025**
6. Announcement of Award(s): **September 12, 2025**
7. Commence Contract Performance: **September 16, 2025**

B. Delivery of Proposals

Proposals in response to this Request for Proposal (RFP) must be received by CCGD **no later than 12:00 noon on September 9, 2025, deadline**. Any proposals received after the scheduled date and time are immediately disqualified. Proposals must be emailed to: procurement@ccadvance.org.

C. Policy of Competition

CCGD conducts all procurement transactions in a manner that provides full and open competition. This RFP identifies all evaluation factors and their relative importance. Technical evaluations will be made of all proposals received. Awards will be made to the responsible offerors and firms whose proposals are most advantageous to CCGD.

PART 2: SPECIAL INSTRUCTIONS AND CONDITIONS

A. Purpose

The purpose of this RFP is to solicit competitive proposals for providing Commercial Insurance Brokerage as described in Attachment A, Scope of Services.

B. Presentation and Negotiations

Any offeror may be requested to make a virtual oral presentation of its proposal to CCGD after the proposal deadline. Such presentations provide an opportunity for the offeror to clarify its proposal and to ensure mutual understanding. Any presentations will be determined and scheduled solely by CCGD.

**Community Council of Greater Dallas
REQUEST FOR PROPOSAL**

C. Open Records

Community Council is subject to the Texas Public Information Act, and its records are subject to disclosure under the law. Therefore, unless the documents you provide are marked confidential and are confidential as a matter of law, they may be disclosed to third parties under a proper Public Information request.

D. Affirmative Action

The contractor shall take all necessary affirmative steps to assure compliance with all federal and state requirements concerning fair employment and employment of people with disabilities, and concerning the treatment of all employees, without regard to discrimination because of race, color, religion, age, sex, or national origin. A contractor will be responsible for any damages from violations of state or federal law, including all costs and expenses, including Attorney's fees, arising from, or relating to such claims.

E. Conflict of Interest and Debarment

The contractor must certify that there is no conflict of interest and that it has not been debarred. Signed conflict of interest forms and Certification of Debarments must be submitted with the proposal.

F. Consideration for Business Diversity

Business diversity will be considered in vendor selection, when appropriate. This includes small, disadvantaged, minority, or women-owned businesses and local businesses.

G. Format

Proposals are to be prepared in a manner designed to provide CCGD with a straightforward presentation of the offeror's ability to satisfy the requirements of this RFP. Offerors must address the technical and logistical factors associated with the proposal. For more specific information on the required format, refer to Section 5 and the attached Scope of Services.

H. Contract

A contract shall be awarded to the responsible offeror whose proposal is determined to be most advantageous, taking into consideration the evaluation factors set forth hereinafter. However, the right is reserved to reject all proposals received, and in all

**Community Council of Greater Dallas
REQUEST FOR PROPOSAL**

cases, CCGD will be the sole judge as to whether an offeror's proposal has or has not satisfactorily met the requirements of this RFP. **CCGD may require several offers selected to participate in negotiations, technical revisions, or other revisions to their proposals prior to contract finalization.** Terms and conditions that are included in this RFP will be a part of all Contracts awarded.

I. Notice

Notice of "Intent to Award Contracts" will be emailed to offerors, informing them of the success, or lack thereof, of their proposal to receive an award.

J. Protest

The request to protest or appeal a contract awarded or to be awarded by Community Council is available to any company that believes they have just cause to do so.

All requests to protest or appeal an RFP award must be submitted to the Director of Compliance. Protests or appeals must be in writing. Please provide in detail with the basis for your request and submit information to support your company's position and concerns in writing for consideration. The Director of Compliance may request additional supporting documentation.

The information provided will be reviewed, investigated, and evaluated by the Director of Compliance with input from the respective Community Council departments' Directors and any employees whose input is deemed necessary. The CEO will review their conclusion. The Director of Compliance will provide a response to you within 15 business days of receipt of your written request. If the investigation requires more time, the Director of Compliance will advise you and give you an estimated date for a response.

PART 3: EVALUATION CRITERIA

CCGD will take into consideration the following information in determining acceptance and approval of proposals.

**Community Council of Greater Dallas
REQUEST FOR PROPOSAL**

Proposals will be evaluated based on the following specific criteria:

1. Organization Capability and Experience (max. 40 points)

- A general summary of the organization's history.
- The number of years the organization has worked with non-profits.
- Description of previous experience and expertise providing commercial brokerage services to non-profit organizations, preferably with an annual budget of \$10 million or more.
- Three reference letters from non-profit organizations doing business with the organization.

2. Coverage of Requirements (See attachment "A" Scope of Services) (max. 35 points)

3. Staff Experience (max 25 points)

- Include summary resumes of key staff to be involved in the project.

The criteria listed above will be used to evaluate proposals. Submit a narrative that addresses each criterion and includes any additional information as desired.

Failure to provide (submit) all required information in this RFP may result in the disqualification of your proposal.

PART 4: SCOPE OF SERVICES

The services covered by this RFP are identified in detail in Attachment "A" Scope of Services included with this Request for Proposal.

PART 5: ORGANIZATION OF PROPOSAL DOCUMENTS

A. PROPOSALS MUST CONTAIN THE FOLLOWING:

1. Signed cover letter from the organization transmitting the proposal package emailed to: Procurement@ccadvance.org.

**Community Council of Greater Dallas
REQUEST FOR PROPOSAL**

2. Proposed Services and Timeline
3. Summary Information Sheet. (Attachment B below)
4. Signed Conflict of Interest Form (Attachment C)
5. Signed Contractor Certification (Attachment D)
6. Specific information addressing each evaluation criteria.

PART 6: APPEALS

The request to protest or appeal a contract awarded or to be awarded by Community Council of Greater Dallas (CCGD) is available to any company that believes they have just cause to do so. All requests to protest or appeal an RFP award must be submitted to Procurement@ccadvance.org.

Protests or appeals must be in writing. Please provide in detail with the basis for your request and submit information to support your company's position and concerns in writing for consideration. CCGD may request additional supporting documentation.

The information provided will be reviewed, investigated, and evaluated by the CEO with input from the respective Community Council (CCGD) departments' Directors and any employees whose input is deemed necessary. The CEO will review their conclusion. The CEO will provide a response to you within 15 business days from receipt of your written request.

If the investigation requires more time, the CEO will advise you and give you an estimated date for a response.

PART 7: ATTACHMENTS A-D

A: SCOPE OF SERVICES ATTACHMENT

B: SUMMARY INFORMATION SHEET

C: NOTIFICATION OF CONFLICT OF INTEREST

D: CONTRACTOR CERTIFICATION

**Community Council of Greater Dallas
REQUEST FOR PROPOSAL**

**ATTACHMENT A
SCOPE OF SERVICES**

In this Request for Proposal (RFP), we are requesting proposals for a Commercial Insurance Broker to assist Administration in making sound and affordable decisions about viable commercial insurance packages for the Agency.

Broker should provide:

- Superior customer service
- Viability of affordable options for all lines of insurance.
- Continual Monitoring of the Commercial Insurance Market
- Regular updates on changes, regulations and reporting deadlines within the Commercial Insurance Market, on local, state and federal levels.
- Open communication

Community Council of Greater Dallas prefers a company that can assess the commercial insurance market, advise on the best solutions and strategies, provide current, relevant, and valuable information to make informed decisions, and cooperatively engage with our Administration.

All brokerage firms submitting a proposal must:

- Have experience in working with Non-profit Organizations with a budget that exceeds 10 million dollars
- Have the expertise, licenses, and resources to provide Commercial Insurance broker/consulting services for current and future operations;
- Consistently maintain and allocate sufficient staffing resources to provide timely service for Community Council of Greater Dallas' Commercial Insurance broker/consulting services/ needs;
- Maintain staff that are qualified and available to provide specialized technical expertise in various disciplines as necessary.

Proposers may not contact the insurance marketplace nor discuss our account with underwriters until we have made our final broker selection.



**Community Council of Greater Dallas
REQUEST FOR PROPOSAL**

Bidders must submit at least 3 letters of reference from non-profit organizations.

Bidder, in its proposal, shall as a minimum, include the following:

A. Company Information

The Bidder should:

- Describe its organization, size, structure, locations, volume of business and years operating.
- Indicate if the company is a small or minority owned business.
- What is your business philosophy?
- Describe the visibility and influence of your company on the employee benefits field.
- Describe your organization's experience working with non-profit organizations

B. References: The Bidder will include at least three letters of reference from non-profits doing business with your company. **Minimum 3**

C. Staff Qualifications The Bidder should describe the structure of the account team that would be assigned. For each member of the team, provide highlights or a summary resume outlining qualification and experience. Provide a summary of roles and distribution of responsibilities. Describe your approach to the ongoing training of your staff.

**Community Council of Greater Dallas
REQUEST FOR PROPOSAL**

**ATTACHMENT B
SUMMARY INFORMATION SHEET**

PROPOSAL: COMMERCIAL INSURANCE BROKAGE

Organization's Name: Address: _____

Contact Person: _____

Attach signed W-9

NAME OF ORGANIZATION: _____

SIGNATURE: _____

TITLE: _____

DATE SIGNED: _____



**Community Council of Greater Dallas
REQUEST FOR PROPOSAL**

**ATTACHMENT C
NOTIFICATION OF CONFLICT OF INTEREST**

I have read the Texas Administrative Code 40 TAC, Rule § 83.1, and hereby notify the Executive Director of the Community Council of Greater Dallas of a conflict of interest I hold.

If there is no conflict of interest or potential conflict of interest, please select “No” for both questions and sign and date.

Does the Applicant have an officer, director, employee, consultant, or owner (in whole or in part) who is:

1. Related to an employee of the Community Council of Greater Dallas (CCGD) or a member of the CCGD Board of Directors?

_____ No

_____ Yes (if yes, please explain):

2. A person who is currently an employee of CCGD or a member of the CCGD Board of Directors, or a volunteer working within CCGD?

_____ No

_____ Yes (if yes, please explain):

I certify that the information above is complete, true, and correct to the best of my knowledge. I understand that a lack of full, true, and complete disclosure may be grounds for withholding payment for delivery of service and may cause contract termination.

Signature of Authorizing Individual: _____

Printed Name and Title: _____

Date: _____

**Community Council of Greater Dallas
REQUEST FOR PROPOSAL**

**ATTACHMENT D
CONTRACTOR CERTIFICATION**

Contractor's First and Last Name: _____

**Certification Regarding
Debarment, Suspension, and Other Responsibility Matters
In Primary Covered Transactions**

1. The prospective contractor certifies to the best of its knowledge and belief that it and its principles:
 - a. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
 - b. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction;
 - c. Have not, with a three-year period preceding this proposal, been convicted of or had a civil judgment rendered against them for violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, destruction of records, making false statements, or receiving stolen property;
 - d. Are not presently indicted for or otherwise criminally or civilly charged by a government entity (Federal, State, or local) with commission or any of the offenses enumerated in paragraph (1)(b) of this certification; and
 - e. Have not within a three-year period preceding this application/proposal, had one or more public transactions (Federal, State, or local) terminated for cause or default.
2. Where the prospective primary participant is unable to certify any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

First and Last Name: _____

Title of Authorized Representative: _____

Signature: _____

Date: _____