STATE OF LOUISIANA, DIVISION OF ADMINISTRATION

through the

OFFICE OF RISK MANAGEMENT

Request for Information
for
INSURANCE BROKER SERVICES

Release Date: July 13, 2026

Response Due: August 17, 2026 by 4:00 PM (CDT)

Responses to this Request for Information are non-binding and are for informational purposes only. The Division of Administration through the Office of Risk Management is not responsible for any costs, including broker costs, incurred in responding to this Request for Information.

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REQUEST FOR INFORMATION

FOR

INSURANCE BROKER SERVICES

1 PURPOSE

The State of Louisiana, Office of the Governor, Division of Administration (DOA), through the Office of Risk Management (ORM), seeks information to assist in its review of its current programs, and potential utilization of multiple broker consultants to meet the needs of the State's evolving risk profile. The purpose of this Request for Information (RFI) is to provide interested parties with sufficient information to enable them to prepare and submit responses for insurance broker services as described herein, and in *Attachments I* through *IV*.

ORM shall not be liable for any costs incurred by Respondent(s) in development of its Response. Any expenses incurred by Respondent(s) in responding to this RFI shall be entirely the responsibility of Respondent(s) and shall not be reimbursed in any manner by ORM.

2 BACKGROUND

ORM was created within the Office of the Governor, DOA pursuant to La. R.S. 39:1527, *et seq*., to provide a comprehensive risk management program for the State of Louisiana. Under the authority of the Commissioner of Administration, the mission of ORM is to develop, direct, achieve and administer a cost-effective comprehensive risk management program for all departments, agencies, boards and commissions of the State of Louisiana, except for exempted institutions as provided for by La. R.S. 17:3139.5(B)(2)(e)(i) and 17:3393(A)(2)(e)(i), in order to preserve and protect the assets of the State of Louisiana. La. R.S. 39:1527, *et seq*., further designates ORM as responsible for all property, casualty, and workers' compensation insurance purchased or self-insured by ORM for all State departments, agencies, boards and commissions, except exempted institutions. Currently, Louisiana State University – Baton Rouge is the only institution exempt from participation in ORM's risk management program.

ORM, under the approval and direction of the Commissioner of Administration, is authorized to contract for consulting and insurance broker services with one or more licensed insurance producers after competitive sealed bids or competitive negotiation processes as set forth in La. R.S. 39:1540(A). Thereafter, the contract(s) may be awarded upon a finding by the Commissioner that the contract(s) are in the best interest of the State. Any broker contract(s) related to ORM's insurance programs are not effective until such contract(s) are approved by the Joint Legislative Committee on the Budget (JLCB) pursuant to La. R.S. 39:1540(B)(2). ORM's Director, Assistant Director, and State Risk Administrator of Underwriting and Loss Prevention are primarily responsible for the oversight of any broker(s) of record. The ORM website can be found at http://www.doa.la.gov/Pages/orm/Index.aspx.

Sedgwick Claims Management Services, Inc. (Sedgwick) is currently the contracted third-party administrator (TPA) for ORM claims and loss prevention services. Claims below the self-insured threshold will be adjusted through the TPA on behalf of all Agencies. The dedicated ORM-Sedgwick website can be found at http://www.laorm.com.

The Litigation Division of the Louisiana Attorney General's Office is responsible for the defense and representation of the State, its departments, agencies, boards and commissions, and covered employees and officials in all claims covered by the Self-Insurance Fund, and in all tort claims whether or not covered by the Self-Insurance Fund as required by La. R.S. 39:1533(B). Legal defense is provided by the Attorney General or by private legal counsel appointed by the Attorney General, with the concurrence of the Commissioner of Administration as set forth in La. R.S. 49:258. Therefore, the Attorney General's Office is statutorily obligated to defend the State even if a commercial policy is implicated.

3 GOALS AND OBJECTIVES

ORM seeks information to assist in its review of its current programs, and the potential utilization of multiple broker consultants to meet the needs of the State's evolving risk profile as ORM currently utilizes a single statewide broker of record. ORM requests information from qualified Respondent(s) that are interested in providing insurance brokerage and consulting services to ORM, which should include Respondent(s)' capabilities, areas of concentration, and innovative processes. Respondent(s) should provide information on all areas of concentration and lines of coverage for which it would be interested in providing services.

4 DEFINITIONS

Agency: Any department, commission, council, board, office, bureau, committee, institution, agency, government, corporation, or other establishment of the executive branch of the State of Louisiana authorized to participate in any Prospective Contract.

Governmental Entity: Administrative bodies, commissions, and departments established by regional or state governments**,** inclusive of public institutions of higher education.

May and Can: The terms "may" and "can" denote an advisory or permissible action.

Must: The term "must" denotes mandatory requirements.

Prospective Contract: A contract awarded under the provisions of La. R.S. 39:1540, subject to review and approval of JLCB, with one or more broker(s) of record to advise ORM regarding its insurance programs and to directly procure insurance for the State.

Respondent: An individual or organization submitting a response to this RFI.

Response: A response to this RFI, in the format identified below in *Section 9* from one or more Respondent(s).

Shall and Will: The terms "shall" and "will" denote mandatory requirements.

Should: The term "should" denotes a desirable action.

State: The State of Louisiana, which does not include any local governments, municipalities, or parishes.

5 Schedule of Events

The schedule of events is as follows:

Event	Date
RFI Release Date	July 13, 2026
Submission of Inquiries	July 27, 2026 (4:00 PM CDT)
Responses to Inquiries	August 10, 2026
Response Submission Deadline	August 17, 2026 (4:00 PM CDT)

This schedule of events is subject to updates and revisions, as deemed warranted by ORM. Any such updates or revisions will be posted on ORM's RFI website listed below in *Section 7*.

6 RFI Coordinator

The RFI Coordinator is:

Kristy Lauff
ORM State Risk Administrator of Underwriting and Loss Prevention
Contact (via email only): ORMProposals@la.gov

7 Respondent Inquiries

Respondent(s) must submit all questions regarding RFI requirements or Scope of Services to the RFI Coordinator at the email address provided above in *Section 6*. ORM will consider inquiries and requests for clarification of the content of this RFI until the deadline specified above in *Section 5*.

ORM will share its responses to all questions submitted by potential Respondent(s) by the date specified above in *Section 5*. All information related to this RFI can be found on ORM's website at https://www.doa.la.gov/doa/orm/rfis/.

8 Desired Qualifications for Respondents

Respondent(s) should meet the following desired qualifications, and complete *Attachment III, Desired Qualifications Documentation*.

8.1 Surplus Lines Broker's License

Respondent(s) should have a surplus lines broker's license.

8.2 PROFESSIONAL LIABILITY (ERROR AND OMISSIONS) COVERAGE

Respondent(s) should have professional liability (error and omissions) coverage with a limit of at least ten million dollars ($10,000,000) per occurrence.

8.3 EXPERIENCE-COMPLEX PROGRAMS

Respondent(s) should have experience in structuring, placing, binding, and servicing complex commercial property and casualty insurance programs. Examples of such experience must be provided.

8.4 EXPERIENCE-GOVERNMENTAL ENTITY

Respondent(s) should have experience in structuring, placing, and binding insurance for a Governmental Entity, as defined above in *Section 4.* At least one example must be provided.

8.5 ANNUAL FINANCIAL STATEMENTS

Respondent(s) should include two (2) years of annual financial statements of the parent company and any subsidiary, beginning with the most recently completed year (audited if available).

9 RESPONSE FORMAT AND CONTENT

Respondent(s) should include with its Response a completed Total Cost Information Form. Respondent(s) shall utilize *Attachment II, Total Cost Estimate Form* to provide the estimated fixed annual fees and *Attachment III, Desired Qualifications Documentation* to confirm their qualifications. Should the Respondent(s) deem any information contained within the Response as proprietary or confidential, then this information should be disclosed and identified with the submission.

Respondent(s) shall organize its Response utilizing the parts and subparts identified below.

9.1 PART 1 - EXECUTIVE SUMMARY

This section serves to introduce the scope of the Response and should include a cover letter with Respondent's(s') contact name, phone number, and email address. This section should also include a summary of the Respondent's(s') qualifications and ability to meet ORM's overall requirements in an appropriate time frame.

9.2 PART 2 - DESIRED QUALIFICATIONS

Respondent(s) shall complete the Desired Qualifications Statement found in *Attachment III, Desired Qualification Documentation*. All required documentation shall be placed in the order in which the qualifications are numbered.

9.3 PART 3 - CORPORATE BACKGROUND AND EXPERIENCE

A. Corporate Background

Respondent(s) shall give a brief description of its company, including but not limited to, the following: a brief history, corporate structure and organization, number of years in business, size, scope, capability, and areas of specialization. Respondent(s) shall include two (2) years of annual financial statements, beginning with the most recently completed year (audited if available). The financial statements should be provided via file share link in the Response. Financial statements of the parent company are acceptable.

B. Experience with Similar-Sized Accounts and References

Respondent(s) must have experience in structuring, placing, binding, and servicing complex commercial property and/or casualty insurance programs. Respondent(s) should include a list of organizations with similar sized accounts and similar risks with whom Respondent(s) has done business within the last three (3) years. Reference information must be listed for each example and should include the organization name, contact name, title, telephone number, and email address, along with the number of years as a client. All references must not be from a person, company or organization with any interest, financial or otherwise, in Respondent's(s') organization.

C. Description of Service Office(s)

Respondent(s) should describe the size and location of the office(s) from which ORM's account would primarily be serviced, and any other regional or national office. Respondent(s) should explain the risk management services available at each of the identified offices, including statistical and quantitative capabilities, risk identification and evaluation methods, data processing services, and the total annual premium volume serviced.

D. Governmental Entity Experience

Respondent(s) should describe its experience and capabilities in providing similar services to those identified in *Attachment I, Sample Scope of Work and Services* for a Governmental Entity. Respondent(s) should be specific and identify projects, dates, and results. Respondent(s) shall provide detailed information regarding experience with Governmental Entity organizations or applicable programs, including number of years, and premium volume written. Respondent(s) should describe direct experience, including number of years, with any procurement of insurance covering Governmental Entities.

9.4 PART 4 - PROPOSED KEY STAFF

Respondent(s) should identify, by name, each of the key staff who would be assigned to the account on a permanent basis, and provide titles, professional designations, area(s) of expertise, and number of years of experience. Respondent(s) should identify the primary point of contact for this Response.

Respondent(s) should identify whether the key staff hold the appropriate license(s) to transact business in Louisiana. Respondent(s) should also disclose whether brokerage staff in the past five years have been, or are currently, the subject of a complaint, investigation or administrative action by the Commissioner of the Louisiana Department of Insurance or another State's insurance regulatory body.

9.5 PART 5 - APPROACH AND METHODOLOGY

Respondent(s) should communicate its understanding of the nature of ORM's program and how its methodology would best meet the needs of ORM. Respondent(s) should specifically identify the program areas in which it is interested in providing services, as well as specific lines of coverage it would be willing to address. Respondent(s) should describe the specialized or unique approaches, services, and/or staff members that would be utilized. At minimum, Respondent(s) should address the following concepts:

1. Identify each area of concentration and coverage line to which the Respondent(s) is interested in participating.
2. Identify the specific areas of ORM's program to which the approach and methodology is responsive (*i.e.*, blanket property, marine, cyber liability, etc.).
3. Describe the functional approach in providing the services, including a detailed description of each task necessary to meet the requirements.
4. Provide a detailed description of any innovative concepts that Respondent(s) recommends, specifically identifying services, account structures, risk transfer solutions, and market access points that are unique to Respondent's(s') organization.
5. Provide existing innovative program structures utilized by Respondent(s) to address unique risk profiles and the applicability to ORM's program.

9.6 PART 6 – TOTAL COST ESTIMATE

Respondent(s) shall provide separate fixed annual fees for ORM's property and/or casualty program, inclusive of all travel, consulting expenses, and costs for the use of a domestic wholesaler. The maximum allowable commission rate is ten percent (10%) for the use of foreign wholesale or intermediary brokers. Respondent(s) shall utilize *Attachment II, Total Cost Estimate Form* to provide the fixed annual fees for those portions of ORM's program it has selected.

If interested in multiple lines of coverage on the program, Respondent(s) shall identify a fee for each line of coverage selected, and a total cost. Respondent(s) may also provide alternative pricing structures in *Attachment II, Total Cost Estimate Form*, and include a description of any such structures within *Section 6* of its Response.

10 RESPONSE SUBMITTAL

Respondent(s) shall submit a Response, electronically via a file share link, containing the information specified above in *Sections 8* and *9,* and their parts and subparts. The Response must be received by the RFI Coordinator on or before the time and date specified above in *Section 5*. All communications, including inquiries and electronic submission of Responses, are to be submitted to the attention of the RFI Coordinator at ORMProposals@la.gov.

ATTACHMENT I: SAMPLE SCOPE OF WORK AND SERVICES

Respondent(s) may utilize this sample Scope of Work and Services as a reference in responding to the approach, methodology, and pricing structures for its Response.

A. Scope of Work

ORM's insurance broker(s) of record shall be responsible for developing and placing the most effective and cost-efficient insurance coverage and providing a range of consulting services associated with ORM's property and/or casualty programs to assist ORM in fulfilling its critical role to ensure proper protection of the State's assets and activities. The broker(s) of record is also responsible for providing annual review of risk exposure and program structure, and developing recommendations and re-structuring options utilizing relevant market conditions and coverages. This includes, but is not limited to, presenting ORM with competitive quotes with recommendations, placing coverage, servicing the coverage, and handling additional insurance coverage placements, as necessary.

STATEWIDE CASUALTY PROGRAM

The current Statewide casualty program for all Agencies is as follows:

- Commercial General Liability including, or independent placement of:
  - Professional Liability
  - Elevator and Escalator Liability
  - Watercraft Liability
  - Public Officials' and Employees' Liability
  - Employee Benefits Liability
  - Garage Keepers' Liability
  - Special Event/Entertainment Liability
  - Liquor Liability
  - Educators' Legal Liability
  - Law Enforcement Liability
- Workers' Compensation and Employers' Liability
- Medical Malpractice
- Wet Marine Hull
- Wet Marine Protection and Indemnity
- Aircraft Hull and Liability
- Airport Liability
- Non-Owned Aircraft Liability
- Cyber Liability (Data Breach Response Services)
- Publishers' Media Liability
- Automobile Liability and Physical Damage
- Bonds (Fidelity & Surety) and Crime
- Club Sports Liability and Accident
- Intellectual Property Liability
- Student Liability including, or independent placement of:
  - Student Organization Liability

  - Student Internship/Professional Liability
  - Participant Accident Insurance
- International Travel Insurance
- Crisis Response Management Coverage
- Pollution Liability
- Single Agency Placements

STATEWIDE PROPERTY PROGRAM

The current Statewide property program for all Agencies is as follows:

- Special Form Property Coverage including Building, Business Personal Property, and Flood
- Terrorism including Nuclear, Biological, Contamination, and Radioactive coverage
- Business Interruption
- Equipment Breakdown
- Fine Arts
- Bridge Property
- National Flood Insurance Program
- Master Builders' Risk and/or Owner Controlled Insurance Program (OCIP)
- Inland Marine

B. Services

Broker(s) of record would be required to provide, at a minimum, the following services to ORM:

1. Place new coverages during the Prospective Contract term.
2. Analyze exposure, claims, coverage forms, and current program data to determine various options in property and/or casualty program structures and provide recommendations to ensure effectiveness and efficiency of ORM's program. Catastrophe modeling through Risk Management Solutions (RMS) and Applied Insurance Research (AIR) is required.
3. Identify programs, products, and markets capable of meeting ORM's coverage needs. Make recommendations regarding quality of markets, limits, and differences in the terms and conditions of various markets.
4. Offer creative solutions and innovative suggestions for ORM's consideration.
5. Assist ORM in identifying and organizing pertinent information to more effectively market the property and/or casualty coverage programs. Coordinate the collection of data to include in any market solicitations.
6. Solicit quotations for the programs and negotiate the lowest possible fees and/or deductible options. ORM will participate in broker meetings with market representatives for the solicitation of the program.
7. Adhere to a maximum ten percent (10%) commission rate for those placements utilizing a foreign wholesale or intermediary broker(s). All foreign wholesale or intermediary compensation must be fully disclosed and pre-approved by ORM. All premiums placed through domestic brokers that have a commission component must be identified and refunded to ORM.

8. Compile multiple competitive quotations for the program in an Excel spreadsheet. Submit an explanation and justification when multiple quotes are unavailable or not in the best interest of ORM's program. Identify markets that decline to offer a quote on coverage, including the market explanation.
9. Consider quotes from all markets. All contacts from qualified and non-qualified markets must be documented and provided to ORM.
10. Bind the program as directed by the Commissioner of Administration, or his authorized delegee. Binders and/or confirmation of coverage shall be required upon placement.
11. Review and verify coverage documents received from all bound insurance markets. Provide confirmation to ORM that coverage is placed utilizing accurate pricing, rating classification, and exposure.
12. Deliver electronic copies of all coverage documents within ninety (90) calendar days of their effective date, or as otherwise requested. All coverage placed with multiple layers must include an Excel graphic display showing markets, policy numbers, limits, premiums, taxes, fees, and commissions per layer.
13. Confirm that compensation, including direct and contingent, on all market proposals has not been assessed or has been credited to the premium billed as the broker(s) of record is prohibited from accepting any contingent income, profit sharing, enhanced commission, or other forms of hidden income associated with a Prospective Contract.
14. Ensure the timely billing of all policies and endorsements to ORM and assist with premium allocations or breakdowns by Agency. Bills shall be submitted to ORM within ten (10) days of binding coverage or endorsements. If a Notice of Cancellation has been issued due to nonpayment of premium, broker(s) of record shall resolve the situation and, to the extent possible, make payment on behalf of ORM.
15. Prepare certificates of insurance and endorsements, when requested, within forty-eight (48) hours on a normal schedule and within twelve (12) hours on a rush schedule.
16. Assist ORM when other related coverage must be added during the term of the Prospective Contract, at no additional cost.
17. Develop a strategy for any upcoming renewal during the Prospective Contract period to be presented in writing to ORM a minimum of seventy-five (75) calendar days before expiration. Include and identify any intended intermediaries used in the solicitation process.
18. Monitor claims submitted to the markets to ensure they are properly handled and responded to in a timely manner. Provide ORM with the claim number and representative contact information for each claim.
19. Provide annual loss runs for each policy, a minimum of sixty (60) calendar days before expiration, including any prior year with open losses. These reports shall reflect claims opened and closed, and claims reserved and paid by policy year (including all allocated loss adjustment expenses) until all claims are closed. These reports shall be cumulative for the coverage year. Loss runs shall be provided upon request.
20. Information to be reflected on the quarterly report for each individual claim shall include, but not be limited to, the following:
    a. Date of Loss;
    b. Status of claim (open, closed, reopened);
    c. Brief Description of Loss;
    d. Name of Agency;
    e. Amount of claim by coverage code;

f. Total Incurred;
g. Amount paid;
h. Amount reserved;
i. Amount recovered;
j. Amount of loss adjustment expenses; and
k. Net Incurred.

21. Advise ORM on a semiannual basis, or as requested, regarding current developments in the marketplace as to coverages, forms, availability, pricing or other significant developments that would impact ORM's program or vendors/contractors.
22. Assist ORM with property-related and/or casualty-related training classes as needed for Agency personnel. This assistance shall include presentations created and/or presented at any ORM conference, meeting or training. Training on specific topics shall be recommended by the Respondent(s).
23. Provide risk management and professional services, as requested by ORM, including, but not limited to, identifying and minimizing loss potential, conducting and/or reviewing property inspections, reviewing casualty exposures, researching alternative risk transfer techniques, attending meetings with Agencies, insurance markets, and/or other consultants.
24. Provide wet marine and aircraft appraisal services every three (3) years for all Agency fleet with survey reports and photographs for each. Valuations are to include both replacement cost and market value.
25. Research and provide recommendations for foreign and domestic market captives and/or risk retention pools.
26. Assist ORM with the analysis and reporting required of Act 715 of the 2014 Louisiana Legislative Regular Session as enumerated in La. R.S. 39:1540 and 1556(10)(b).
27. Assist with reports and supporting justification needed for certification of ORM's property program through the Louisiana Department of Insurance as required by the Robert T. Stafford Disaster Relief and Emergency Assistance Act.
28. Work with the ORM Underwriting Manager and ORM Loss Prevention Manager to coordinate quarterly round table events addressing targeted topics impacting higher education.
29. Provide monthly newsletters on trending risk topics to the ORM Underwriting Manager and ORM Loss Prevention Manager to share with Agencies.
30. Prepare and provide monthly safety newsletters to the ORM Loss Prevention Manager to share with Agencies.
31. Coordinate infrared testing and boiler inspections through commercial carriers.

C. Key Deliverables

The below Key Deliverables are subject to a performance penalty such that the flat annual fee otherwise due to broker(s) of record will be reduced by one thousand dollars ($1,000) per day when each independent Key Deliverable is not successfully completed and delivered in the timeframes stated herein:

1. Broker(s) of Record shall bind coverage as agreed upon by the Commissioner of Administration or his authorized delegee within five (5) calendar days of his approval.

2. Broker(s) of record shall deliver all coverage documents electronically within ninety (90) calendar days of their effective date.
3. Broker(s) of record shall deliver all certificates of insurance and endorsements within forty-eight (48) hours on a normal schedule and within twelve (12) hours on a rush schedule. Rush schedules include, but are not limited to, those situations where the law requires coverage on a piece of equipment or property before it can placed in use, and there is an emergency condition that requires immediate use.
4. Broker(s) of Record will report all claims within twelve (12) hours to the applicable commercial insurance carriers when notified by ORM and/or the TPA.
5. Broker(s) of record will submit annual placement reports to ORM within eight (8) weeks of annual renewals, following coverage effective dates from the start of ORM's fiscal year on July 1st. These reports shall include a breakdown of all coverage lines placed, policy numbers, premiums charged, and changes to coverage terms, pricing, and any other relevant information.
6. Broker(s) of record shall provide aircraft and wet marine appraisal services every three (3) years for all Agency fleet with survey reports and photographs of each, with valuations to include both replacement cost and market value. The appraisal process will begin in August and final reports are due by December 31st each year.
7. Broker(s) of record is required to submit an annual stewardship report two (2) weeks after the end of each Prospective Contract year.

D. Reporting

ORM requires all the following reports during the Prospective Contract year:

1. Claims history and loss runs shall be submitted annually, a minimum of sixty (60) calendar days before expiration of coverage. Additionally, ORM may request claims history and loss runs at any time.
2. Premium rates and commission rates shall be reported per market per layer on the bound insurance program within thirty (30) calendar days of binding. The required method of reporting is an Excel spreadsheet.
3. Broker(s) of record shall submit an annual statement identifying all income earned by each party participating in the placement of each of the commercial insurance coverage programs and verify that no direct or indirect compensation has been retained.
4. Custom reports, analyses, and/or recommendations may be requested by ORM at any time. ORM shall communicate such need to the broker(s) of record and set a deadline for the submission of such reports.

Attachment II: Total Cost Estimate Forms

Respondent Name: ____

A. FIXED ANNUAL COSTS/FEE SCHEDULE

Respondent(s) shall select all appropriate lines of coverage below and provide estimated fixed annual costs.

1. STATEWIDE CASUALTY PROGRAM

Fixed annual fee for broker services inclusive of all travel, consulting expenses, and costs for use of a domestic wholesaler:

Coverage Line	**Included in Response**	**Fixed Annual Cost/ Fee per Line**
All Lines	Yes ☐ / No ☐	
Commercial General Liability (*identify specific lines of interest*)	Yes ☐ / No ☐	
Workers' Compensation and Employers' Liability	Yes ☐ / No ☐	
Medical Malpractice	Yes ☐ / No ☐	
Wet Marine Hull	Yes ☐ / No ☐	
Wet Marine Protection and Indemnity	Yes ☐ / No ☐	
Aircraft Hull and Liability	Yes ☐ / No ☐	
Airport Liability	Yes ☐ / No ☐	
Non-Owned Aircraft Liability	Yes ☐ / No ☐	
Cyber Liability (Data Breach Response Services)	Yes ☐ / No ☐	
Publishers' Media Liability	Yes ☐ / No ☐	
Automobile Liability and Physical Damage	Yes ☐ / No ☐	
Bonds (Fidelity & Surety) and Crime	Yes ☐ / No ☐	
Club Sports Liability and Accident	Yes ☐ / No ☐	
Intellectual Property Liability	Yes ☐ / No ☐	
Student Liability (*identify specific lines of interest*)	Yes ☐ / No ☐	
International Travel Insurance	Yes ☐ / No ☐	
Crisis Response Management Coverage	Yes ☐ / No ☐	
Pollution Liability	Yes ☐ / No ☐	
Other ___________________________________	Yes ☐ / No ☐	

Cost for all services indicated for Statewide Casualty Program: _________________________

2. STATEWIDE PROPERTY PROGRAM

Fixed annual fee for broker services inclusive of all travel, consulting expenses, and costs for use of a domestic wholesaler:

Coverage Line	**Included in Response**	**Fixed Annual Cost/ Fee per Line**
All Lines	Yes ☐ / No ☐	
Special Form Property including Building, Business Personal Property, and Flood	Yes ☐ / No ☐	
Terrorism including Nuclear, Biological, Contamination, and Radioactive coverage	Yes ☐ / No ☐	
Business Interruption	Yes ☐ / No ☐	
Equipment Breakdown	Yes ☐ / No ☐	
Fine Arts	Yes ☐ / No ☐	
Bridge Property	Yes ☐ / No ☐	
National Flood Insurance Program	Yes ☐ / No ☐	
Master Builder's Risk and/or OCIP	Yes ☐ / No ☐	
Inland Marine	Yes ☐ / No ☐	
Other ___________________________________	Yes ☐ / No ☐	

Cost for all services indicated for Statewide Property Program: _________________________

TOTAL COST FOR CASUALTY AND PROPERTY PROGRAMS

The total cost proposed shall fulfill the requirements found in *Attachment I, Sample Scope of Work and Services*.

Total Cost for all services indicated combined (1 + 2): ________________________________

B. ALTERNATIVE PRICING COSTS/FEE SCHEDULE

Respondent(s) may also select all appropriate indications below and provide an alternative pricing structure or fee schedule as an alternative option to the current mandatory Fixed Annual Fee schedule provided above.

1. STATEWIDE CASUALTY PROGRAM

Alternative pricing structures shall be detailed as an attachment to this form, accounting for all travel, consulting expenses, and costs for use of a domestic wholesaler:

Coverage Line	**Included in Response**	**Alternative Cost Structure**
All Lines	Yes ☐ / No ☐	
Commercial General Liability (*identify specific lines of interest*)	Yes ☐ / No ☐	
Workers' Compensation and Employers' Liability	Yes ☐ / No ☐	
Medical Malpractice	Yes ☐ / No ☐	
Wet Marine Hull	Yes ☐ / No ☐	
Wet Marine Protection and Indemnity	Yes ☐ / No ☐	
Aircraft Hull and Liability	Yes ☐ / No ☐	
Airport Liability	Yes ☐ / No ☐	
Non-Owned Aircraft Liability	Yes ☐ / No ☐	
Cyber Liability (Data Breach Response Services)	Yes ☐ / No ☐	
Publishers' Media Liability	Yes ☐ / No ☐	
Automobile Liability and Physical Damage	Yes ☐ / No ☐	
Bonds (Fidelity & Surety) and Crime	Yes ☐ / No ☐	
Club Sports Liability and Accident	Yes ☐ / No ☐	
Intellectual Property Liability	Yes ☐ / No ☐	
Student Liability (*identify specific lines of interest*)	Yes ☐ / No ☐	
International Travel Insurance	Yes ☐ / No ☐	
Crisis Response Management Coverage	Yes ☐ / No ☐	
Pollution Liability	Yes ☐ / No ☐	
Other ___________________________________	Yes ☐ / No ☐	

Cost for all services indicated for Statewide Casualty Program:______________________

2. STATEWIDE PROPERTY PROGRAM

Alternative pricing structures shall be detailed as an attachment to this form, accounting for all travel, consulting expenses, and costs for use of a domestic wholesaler:

Coverage Line	**Included in Response**	**Alternative Cost Structure**
All Lines	Yes ☐ / No ☐	
Special Form Property including Building, Business Personal Property, and Flood	Yes ☐ / No ☐	
Terrorism including Nuclear, Biological, Contamination, and Radioactive coverage	Yes ☐ / No ☐	
Business Interruption	Yes ☐ / No ☐	
Equipment Breakdown	Yes ☐ / No ☐	
Fine Arts	Yes ☐ / No ☐	
Bridge Property	Yes ☐ / No ☐	
National Flood Insurance Program	Yes ☐ / No ☐	
Master Builder's Risk and/or OCIP	Yes ☐ / No ☐	
Inland Marine	Yes ☐ / No ☐	
Other ___________________________________	Yes ☐ / No ☐	

Cost for all services indicated for Statewide Property Program:________________________

TOTAL COST FOR STATEWIDE PROPERTY AND CASUALTY PROGRAMS

The total cost proposed would fulfill the requirements found in *Attachment I, Sample Scope of Work and Services*.

Total Cost for all services indicated combined (1 + 2): ______________________________

Attachment III: Desired Qualifications Documentation

Respondent(s) must respond to the following questions and attach the required documentation.

YES	NO		REQUIRED DOCUMENTATION	ATTACHED
☐	☐	1.	Respondent(s) have a Louisiana surplus lines broker's license.	Responsive document(s) are attached or provided in Response. ☐
☐	☐	2.	Respondent(s) have Professional Liability (errors and omissions) coverage with a limit of at least ten million dollars ($10,000,000) per occurrence.	Responsive document(s) are attached or provided in Section 2 of Response. ☐
☐	☐	3.	Respondent(s) have experience in structuring, placing, binding, and servicing complex commercial property and/or casualty insurance programs. At least one example of such experience must be provided.	Responsive information is included in Section 3.B of Response. ☐
☐	☐	4.	Respondent(s) have direct experience in the procurement of insurance and insurance related services for a Governmental Entity. At least one example of such experience must be a provided.	Responsive information is included in Section 3.D of Response. ☐
☐	☐	5.	Respondent(s) have provided the financial statements requested under Section 3.A as an attachment or internet link. Parent to subsidiary documentation included, as applicable.	Responsive document(s) are attached or provided in Section 3.A of Response. ☐

Attachment IV: Links to Relevant ORM Documents

1) Summary of Coverages effective July 1, 2025:
https://www.doa.la.gov/media/yljbqutw/website-summary-fy-2025-26.pdf

2) Fiscal Year 2024-2025 Commercial Insurance Placement Report:
https://www.doa.la.gov/media/wubnvjnu/state-of-la-insurance-placement-report-2024-final.pdf

3) Sample Schedule of Values:
https://www.doa.la.gov/doa/orm/rfis/
Select "Sample Schedule of Values" to download Excel file

4) Link to the Fiscal Year 2023 – 2024 ORM Annual Report
https://www.doa.la.gov/media/ffzbwfyb/orm-annual-report-for-2023-2024.pdf

5) Current ORM Master Location List of Covered Agencies
https://www.doa.la.gov/media/03bdlxg4/10-1-2025-orm-master-location-website.pdf

6) Link to Aviation Fleet Schedule:
https://www.doa.la.gov/media/c3xeravw/aviation-schedule-as-of-4-01-2026.pdf

7) Link to Wet Marine Fleet Schedule:
https://www.doa.la.gov/media/nesgmnj4/wet-marine-schedule-as-of-4-2026.pdf

8) ACT 715 of the 2014 Regular Legislative Session
https://www.doa.la.gov/media/e2flsre0/2014-legislative-regular-session-act-715.pdf