



MASTER AGREEMENT #RFP 012125
CATEGORY: Risk Management, Employee Benefits, and Insurance Consulting Services
SUPPLIER: Alliant Insurance Services, Inc.

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 Alliant Insurance Services, Inc., 18100 Von Karman Avenue, 10th Floor, Irvine, CA 92612 (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 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 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 it will provide immediate 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 Sourcwell 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 Sourcwell 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. Unless otherwise required by law, audit rights are limited to once per year.
- 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.
- 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.** 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 attorneys' fees incurred by Sourcewell, resulting from any act or omission in the performance of this Agreement by the Supplier or its agents or employees in violation of the terms of this Agreement; 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.
 - ii) **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.
 - 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) **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 construction defect, 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
- 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 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 General Liability and Umbrella (as applicable) 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.
 - 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.

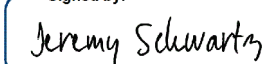
- 1) **Quotes to Participating Entities.** Suppliers are encouraged to provide all pricing information regarding the total cost of acquisition when quoting to a Participating Entity. Suppliers and

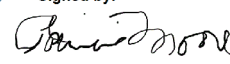
Participating Entities are encouraged to include all cost specifically associated with or included within the Suppliers proposal and Included Solutions within transaction documents.

- 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.

Sourcewell

Alliant Insurance Services, Inc.

Signed by:

C0FD2A139D06489...
By: _____
Jeremy Schwartz
Title: Chief Procurement Officer
Date: 3/6/2025 | 12:26 PM CST

Signed by:

C3FF88FD2F634FB...
By: _____
Patricia Moore
Title: First VP, Consultant
Date: 3/6/2025 | 12:23 PM CST

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

Vendor Details

Company Name: Alliant Insurance Services

Does your company conduct business under any other name? If yes, please state: California

Address: 18100 Von Karman Avenue
10th Floor
Irvine, CA 92612

Contact: CATHY HUYNH

Email: cathy.huynh@alliant.com

Phone: 949-660-5943

Fax: 949-660-5943

HST#:

Submission Details

Created On: Tuesday December 03, 2024 12:00:25

Submitted On: Friday January 17, 2025 13:33:00

Submitted By: CATHY HUYNH

Email: cathy.huynh@alliant.com

Transaction #: f1e5df8e-c39d-4971-a7a5-55eb47e65037

Submitter's IP Address: 136.226.78.83

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.	Alliant Insurance Services, Inc.
2	In the event of award, is this entity the Responsible Supplier that will execute the master agreement with Sourcewell? Y or N.	Yes
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).	Alliant Insurance Services, Inc. is the primary bidder and will not require sub-consultants to fulfill the proposed Scope of Work as outlined in the RFP.
4	Provide your CAGE code or Unique Entity Identifier (SAM):	CAGE 55P52
5	Provide your NAICS code applicable to Solutions proposed.	524210
6	Proposer Physical Address:	Headquarters and Servicing Office: 18100 Von Karman Avenue, 10th Floor, Irvine, CA 92612 Alternate Servicing Office: 333 S. Hope St. Suite 3700. Los Angeles, CA 90071
7	Proposer website address (or addresses):	Alliant.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):	Authorized to bind the firm: Patricia Moore First VP, Consultant 333 S. Hope St. Suite 3700. Los Angeles, CA 9007 Phone: (213) 270-0978 Email: patricia.moore@alliant.com
9	Proposer’s primary contact for this proposal (name, title, address, email address & phone):	Patricia Moore First VP, Consultant 333 S. Hope St. Suite 3700. Los Angeles, CA 9007 Phone: (213) 270-0978 Email: patricia.moore@alliant.com
10	Proposer’s other contacts for this proposal, if any (name, title, address, email address & phone):	Cathy Huynh, GBDS AVP, Programs Service Manager 18100 Von Karman Avenue, 10th Floor, Irvine, CA 92612 Phone: (949) 660-5943 Email: cathy.huynh@alliant.com Chris Tobin, ARM-P, Senior Vice President, Property and Casualty Team Lead 18100 Von Karman Avenue, 10th Floor, Irvine, CA 92612 (949) 660-8143 Ctobin@alliant.com

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

Line Item	Question	Response *
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<p>11</p>	<p>Provide a brief history of your company, including your company's core values, business philosophy, and industry longevity related to the requested Solutions.</p>	<p>About Alliant Alliant Insurance Services, Inc. was founded in 1925. We are a privately held corporation, majority employee-owned, with additional investment provided by Stone Point Capital LLC. Our headquarters is located at 18100 Von Karman Avenue, 10th Floor, Irvine, CA 92612. Alliant operates over 130 offices across the United States, employing more than 13,300 individuals. Our principal lines of business include Employee Benefits, Retirement Consulting, Property & Casualty, Mergers & Acquisitions, Global Consulting, Workers' Compensation, Liability, Surety and Financial Services, Risk Management Consulting, Specialty Insurance Programs, Underwriting & Financial Services, Specialized Business Services, Preferred Vendor Program, Loss Control, Property Appraisal, and Third-Party Administration.</p> <p>Core Values Entrepreneurialism: Our teams are empowered to look beyond the status quo to find answers that solve problems and deliver results Relationships: We build and cultivate long-term client and vendor partner relationships based on trust, integrity, and results. Service: We are an extension of our clients' business and always advocate for their success. People: We support diversity & inclusion, invest in our team, and inspire excellence.</p> <p>Business Philosophy Creative agility enables us to help our clients build resilience and turn change into opportunity.</p> <ul style="list-style-type: none"> • Perspective: Everything we do is driven by data and filtered through deep industry experience to help clients see around corners and distinguish relevant trends from shiny objects. • Partnership: From implementation to execution, we work hand in hand with our clients to deliver benefits strategies that are actionable and user-friendly. • Performance: Every strategy is built around the client's business and constantly evaluated for ROI. Better data and better tools help us continually optimize our plans. <p>Financial Stability Alliant is privately owned, with over 52% of equity held by employees of Alliant. We are the 5th largest U.S. insurance brokerage. We generate over \$4.6B+ in revenue and Business Insurance reports that Alliant is the fastest-growing broker of those with over \$1 billion in annual revenue. Our growth has been primarily organic, but we have also enjoyed significant success in attracting industry leaders from our competitors and some of our growth has been achieved through targeted acquisitions. As a private company we do not release financials, but should financials be required as a condition of establishing a client relationship, we can arrange for an exchange with our CFO's office. There are no organizational changes or developments that would affect Alliant's ability to provide services to your members. There are no planned divestitures, changes in client base, or outstanding legal matters. While our organization is amid significant growth, we remain true to our guiding philosophy which is to seek out like-minded companies and professionals who strive to excel and live to serve.</p>
<p>12</p>	<p>What are your company's expectations in the event of an award?</p>	<p>Alliant will partner with Sourcewell to provide its participating entities with top-of-the-line Risk Management, Employee Benefits, and Insurance Consulting Services. We aim to deliver exceptional value through innovative solutions tailored to meet the unique needs of Sourcewell participants. Our commitment is to foster a collaborative relationship, ensuring that all services are aligned with Sourcewell's strategic goals and objectives. We also anticipate actively engaging in continuous learning and development opportunities with Sourcewell and its participating entities. Our team is dedicated to maintaining open communication channels, providing regular updates, and soliciting feedback to refine our services and strategies further. In addition, we expect to support Sourcewell in expanding its reach and impact by offering educational seminars and workshops, facilitating knowledge sharing among participating entities, and promoting a culture of excellence and innovation within the network. Our goal is to be a trusted partner that contributes significantly to the success and growth of Sourcewell.</p>
<p>13</p>	<p>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.</p>	<p>Alliant's Financial Statements have been uploaded under separate cover in the document section of the bid platform. This document is confidential and must be redacted if the proposal is released.</p>

14	What is your US market share for the Solutions that you are proposing?	Alliant Insurance Services holds a prominent position among U.S. insurance brokerages. According to Business Insurance's 2024 rankings, Alliant is ranked as the 5th largest broker of U.S. business, with a brokerage revenue of approximately \$4 billion, reflecting a 21.1% increase from the previous year. These rankings underscore Alliant's significant presence and growth in the US insurance markets.	*
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 Sourcwell if it enters a bankruptcy proceeding at any time during the pendency of this RFP evaluation.	Alliant has not filed for bankruptcy within the last seven years.	*
16	How is your organization best described: is it an agency, broker, etc?	Alliant Insurance Services, Inc. is the 5th largest insurance brokerage and consulting firm in the United States.	*
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.	Alliant is licensed in all 50 states. We are happy to provide a copy of our license upon request. Alliant employees must hold individual state issued Life & Health or Property & Casualty Insurance licenses. All Alliant Employees are currently licensed or will obtain the necessary licenses before engaging in business transactions, ensuring compliance with all state and local laws and regulations.	*
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 Sourcwell if it enters a debarment or suspension status any time during the pendency of this RFP evaluation.	Alliant Insurance Services, Inc. is a party to certain legal proceedings consistent with a business and business enterprise of its size and scale. None of these proceedings, or their resolution, will bear on Alliant's viability or ability to deliver the services outlined in this proposal.	*
19	Describe any relevant industry awards or recognition that your company has received in the past five years.	In the past five years, Alliant has received several industry awards and recognitions, including: <ul style="list-style-type: none"> • 2024 Business Insurance's 100 Largest Brokers of U.S. Business: Alliant earned the #5 position in the US and stands at #8 on the World's 10 Largest Insurance Brokers list. • 2024 Insurance Business America's Fast Brokerages: Alliant Insurance Services was named a top-performing insurance brokerage firm based on growth. • 2024 Broker Team of the Year: U.S. Insurance Award, selected by a panel of risk managers, these awards honor collaborative projects and teams in the commercial insurance field. • 2023 Forbes List of America's Best Large Employers • 2023 Forbes' America's Best Employers for Diversity: Alliant was named on this list for the second consecutive year, recognizing our commitment to diversity, equity, inclusion, and belonging. • 2023 Diversity & Inclusion Initiative of the Year: Awarded to Alliant at Business Insurance's U.S. Insurance Awards for outstanding diversity and inclusion initiatives. • Insurance Business America's Elite Women's Awards • Risk & Insurance - Power Broker Designation • 2023 Community Outreach Project of the Year: Alliant's World Food Derby was named a finalist at the Business Insurance U.S. Insurance Awards. The competition raised \$2.3 million in combined cash, food, and essential item donations, with 1,700 volunteer hours contributed by employees. • Alliant Insurance Foundation Fellows: Honored for our summer fellowship program, providing racial and ethnic minority students with in-depth career experience. 	*
20	What percentage of your sales are to the governmental sector in the past three years?	Alliant has consistently demonstrated its commitment to serving the governmental sector, with steady engagement in both Property & Casualty and Employee Benefits. While sales to this sector represent ±10% of our overall sales, our client base represents thousands of counties, cities, states and special districts throughout the US. Alliant has expanded our presence in many regions of the country in the past 3-5 years placing a priority on growing our public entity practice nationally and we expect this sector to play an increasingly pivotal role in Alliant's future business strategy in those areas.	*
21	What percentage of your sales are to the education sector in the past three years?	Alliant has thousands of clients in the education sector nationally, and our efforts to expand our reach in education continue to grow. While we don't rigorously monitor sales by sector, the percentage of sales attributable to the education sector (public, private and charter for all levels) is estimated to be ±10%. Alliant has actively broadened its presence in various regions across the country, placing significant emphasis on advancing our education sector practice. We have worked closely with school districts, higher education institutions, and other educational entities to address their unique challenges and needs. This concerted focus has resulted in a steadily increasing portfolio of education sector clients, and we anticipate that this sector will continue to grow moving forward.	*

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?	Alliant was recently awarded cooperative purchasing contracts with the State of Arizona for both Employee Benefits and Property and Casualty. These contracts can be utilized by all public entities in the State of Arizona.	*
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?	N/A	*

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 *	
Alameda County Schools Insurance Group	Jackie Kim	(925) 225-1030	*
San Bernardino Mountains Community Healthcare District	Mark Turner	(909) 436-3200	*
El Camino Healthcare District	Mike Walsh	(650) 940-7240	*
Irvine Ranch Water District	Stephen Aryan	(949) 453-5428	

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.	<p>Given Alliant’s national presence and scope, which includes more than 13,300 employees in over 130 offices across 35 states, working with both regional and national/multi-state clients, we are prepared to serve Sourcwell participating entities throughout the United States. At Alliant, we are proud of our long industry tenure and leading position in serving our Public Entity clients. We continue to heavily invest in this sector and have a highly experienced team of more than 300 associates that are exclusively dedicated to the public entity community throughout the nation.</p> <p>As one of the top 5 largest commercial retail insurance brokerage firms in the U.S., we can negotiate discounts with the insurance carriers that are often unavailable to others in the market. We have a track record of success in managing relationships with Insurance Carriers and other vendors and in negotiating costs and plan provisions on our clients’ behalf.</p> <p>Alliant employees are direct employees with specific sales or service roles and responsibilities. Our sales force consists of employees who are Consultants and Account Executives who will be trained to understand the value of, and the internal procedures necessary to deliver and promote this Contract opportunity to Sourcwell participating entities.</p> <p>Our offices are in 35 states, including Arizona, Arkansas, California, Colorado, Connecticut, Florida, Georgia, Hawaii, Idaho, Illinois, Iowa, Kentucky, Louisiana, Maine, Maryland, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Jersey, New York, North Carolina, Ohio, Oklahoma, Oregon, Pennsylvania, Tennessee, Texas, Virginia, Washington, and Wisconsin.</p> <p>Additionally, Alliant employees are based in many other states or are assigned territories, ensuring that Alliant provides comprehensive national coverage across the United States. For example, our Seattle office serves Alaska and works with numerous clients in the Alaskan marketplace.</p>	*

<p>26</p>	<p>Describe the network of agents, brokers, and consultants who will deliver Solutions, including dealers, distributors, resellers, and other distribution methods.</p>	<p>While our organization operates nationally and includes many resources, we have an entrepreneurial focus and flat organizational structure. Our U.S. Employee Benefit practice is split amongst three regions and regional leaders. These leaders drive consistent training, strategy, and implementation of specialized programs. This structure allows us to leverage broker and consulting resources across all markets, including training, and providing our sales and marketing representatives with critical information pertinent to the Sourcewell award.</p> <p>The Alliant ONE P&C structure allows us to serve our clients in a manner that is unmatched by any other broker. We are ONE team. There are no silos by product or separate departments for broking and placement. Alliant's ONE team structure, which is a cornerstone of our culture, mandates that we bring the best brokerage talent to the client to manage specific, complex assignments. Being privately owned means that we answer to our clients—not stock analysts or stockholders.</p> <p>Alliant maintains a management and service platform focused on the development of a cohesive National Public Entity Practice without regard to geographical boundaries. Company-wide, we have over 300 employees dedicated specifically to the public sector. Though there is value in having local representation, it is our belief there is immeasurable value in having a team of public entity specialists with national experience and a global perspective at one's disposal. Our recommended team of experienced colleagues works exclusively on public sector risks. This assures that experienced individuals with insight and creativity will be utilized to benefit your members.</p> <p>We believe Alliant's defining differentiator is our people. The individuals proposed to represent and serve on the Sourcewell account are deeply committed, incredibly talented, highly creative, and professionally respected members of the insurance community. The brokers selected to be part of the team were intentionally chosen because of their specific skill sets which we believe best compliments Sourcewell. These are all senior brokers with significant years of experience who have worked together on numerous joint projects with remarkable success. In addition, there are numerous safeguards built in to ensure no service disruptions – we are always connected 24/7.</p> <p>All members of this team meet rigorous standards. They are employed based on proven experience within the Public Entity sector and maintain their expertise, keeping up with the latest developments in risk management and trends in the business world at large. We host conferences and seminars as well as publishing information that promotes elevated levels of knowledge among our associates and clients.</p> <p>Given our large Public Sector practice and focus, our broker and consulting resources are skilled at selling to Public Sector agencies and assisting our Group Purchasing partners in growing their participating entities. Our sales force consists of employees including agents, brokers, and consultants who will be trained to understand the value of, and the internal procedures necessary to deliver and promote this Contract opportunity to Sourcewell participating entities.</p> <p>In addition to the internal network of agents, brokers, and consultants mentioned earlier, we possess extensive experience in managing large, pooled purchasing programs. Through the management of these programs, we have established connections with external agents, brokers, and consultants. The partnerships with external co-brokers provide an additional avenue to deliver Sourcewell solutions.</p>
<p>27</p>	<p>Service force.</p>	<p>Our service philosophy is one based on providing customized solutions using client focused teams, and disciplined processes. We will have a cross-functional team that combines a diverse set of resources experienced in servicing and those that know the market specifically for public entities, education, and non-profit groups. The number of service team associates varies by product.</p> <p>Our culture of accountability is demonstrated in the approach our employees take to servicing our customers. Alliant places significant importance on measuring and defining client satisfaction to improve our services and maintain long-term relationships with our clients. We encourage day-to-day feedback to demonstrate client satisfaction. Our service team provides multiple outlets for frequent and candid feedback, and we value and act upon our clients' recommendations for improving our relationship.</p>

<p>28</p>	<p>Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others.</p>	<p>Prospective clients can reach out to us through email or phone for the first point of contact. We will discuss the Sourcewell award and how the participating entity can access our services. Our team uses an organized; disciplined process to start our relationship successfully and efficiently with a new client; learn about their goals and priorities; design a strategy; implement solutions; and monitor success. We will discuss what information or items are needed to become an Alliant client.</p> <p>For Benefits: Our most successful client partnerships have the following key features: Good data: With access to your census and plan data, we can learn about your people; your plans; your vendor partners; and your claims experience. Data allows us to understand demography; utilization; cost drivers; and how members interact with vendors. We use data to support benefit strategy; HR/Benefits team needs; and Finance. Strategic perspective: When employers have a good sense of their benefits-related priorities; we are in the best position to develop a tailored benefit strategy. Priorities may include one or more of the following: positioning relative to competitive norms; affordability; cost containment; wellness; well-being; and alignment with diversity and inclusion goals. Supportive partnership: We are prepared to take responsibility for a wide range of activities managing your plans and vendors; addressing plan or employee issues as they arise; evaluating plan performance; supporting annual enrollment; analyzing experience; underwriting; and helping ensure plans are compliant. We are most successful and can do our best work when our team has an open; day-to-day relationship with your team. Engaged stakeholders: The most successful relationships; and the relationships that produce the most successful benefit strategies; are those where we have the engaged support of key stakeholders. These stakeholders include corporate leaders; division leads; head of HR/Benefits; Finance; and in some cases, representative employees. Good governance: Good governance and disciplined decision-making are key to the success of benefit strategies. Plan sponsors increasingly are reviewing governance of their benefit plans to ensure that actions and decisions are appropriately reflective of their fiduciary responsibility; align with the company's stated strategy; and are properly documented.</p> <p>For Property & Casualty: Alliant will manage all orders directly in most cases, however sometimes we utilize intermediaries where it brings value to our clients, the use of intermediaries, or "wholesalers," is always only pursued when beneficial for the client. Each account and risk is different and is why the use of intermediaries is on a case-by-case basis.</p> <p>When a retail broker such as Alliant is unable to access a certain market, a wholesale broker is utilized as they will have access to specialty lines insurance companies to place the business with. These markets include specialty-only insurers, specialty divisions of larger multi-line insurers and international insurers in London or Bermuda for example. Many of these insurers have limited distribution or wholesale-only distribution models and are organized to work with specialty wholesale brokers. An account may need to be placed in the surplus lines market to take advantage of the flexibility in pricing and or coverage the market provides.</p> <p>Alliant is independent and does not own any intermediaries or international insurers (as many of our larger competitors do), and therefore we are able to partner with any intermediary or wholesaler at our own discretion. Again, this is only pursued when beneficial for the client and a pricing or coverage advantage will be presented.</p>
<p>29</p>	<p>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>	<p>Alliant's Service Philosophy is centered on forming integrated consulting and service teams that revolve around our clients. We aim to make our clients' lives easier by acting as an extension of their HR and Benefits team. We provide the resources to ensure the successful execution of benefit program strategies and offer day-to-day support for ongoing benefit program management.</p> <ul style="list-style-type: none"> • Regular Communication: We believe in maintaining regular communication with our clients. <ul style="list-style-type: none"> o Collaboration is best achieved through consistent contact. o We strive to be an integral part of our clients' teams, which require frequent communication. o The frequency and modality of formal meetings throughout the year are tailored to each client's specific needs, complexity, and ongoing projects. • Meetings: We expect to hold various meetings with our clients, including: <ul style="list-style-type: none"> o Pre-Renewal Strategy Meeting o Claims Experience Review (conducted through calls or webinars) o Renewal and Marketing Presentation Meeting(s) o Open Enrollment Meeting(s) o Annual Debrief Meeting o Bi-Weekly Team Check-in Calls • Annual Stewardship Reports: We provide annual stewardship reports that focus on accountability and transparency. These reports track the progress made towards achieving set goals and deliverables.

- Responsiveness: We prioritize responsiveness, committing to a maximum 24-hour response time for calls or emails.
 - o Our team is dedicated to assisting with billing disputes and diligently researching and resolving any claim and eligibility issues that may arise.
 - o We also monitor the service provided by carriers and third-party administrators to ensure our clients receive the best possible support.
- Data Analysis and Recommendations: By tracking claims trends and member services data, we can assess and make recommendations for plan changes.
 - o We identify any employee education needs to improve the overall benefit program.
- Accessible and Responsive Partner: Our service philosophy revolves around being an accessible and responsive partner to our clients.
 - o We combine the strategic expertise and resources of a national consultant with the personalized, hands-on customer service of a local broker.
 - o Our goal is to align our clients' benefits strategy with their overall business strategy and employee culture.
 - o We identify and address risks and cost drivers, develop affordable and compliant benefit programs, and provide an excellent experience for both employers and employees.

Gauging Client Satisfaction

At Alliant, we prioritize client success and satisfaction by following a simple and effective process:

- Asking, Listening, and Responding
 - We actively engage with our clients to understand their needs and expectations.
 - We listen attentively to their feedback and concerns.
 - We promptly respond to address any issues or requests.
- Client Success in Meetings
 - Client success and satisfaction are always on the agenda for every meeting, whether virtual, by phone, or in person.
- Benefits Service Calendar
 - We use a Benefits Service Calendar to document and track the progress of your benefits program.
 - The calendar serves as a record of Alliant's service commitments, ensuring accountability for their fulfillment.
- Employee Feedback
 - This feedback helps us identify and address any employee satisfaction issues.
- Quarterly Check-ins
 - The Alliant Account Executive for Sourcewell will check in with your executive management and benefits team quarterly, at minimum.
- Annual Stewardship Meeting
 - We conduct an annual stewardship meeting with you to review program results from the completed plan year.
 - This discussion includes overall client success and the potential need for any changes in Alliant's service delivery.
- Prompt Resolution
 - o Any unresolved concerns are escalated to the appropriate team members, and progress is monitored to ensure timely resolution.

Alliant has consistently worked to develop document review requirements, audit protocols, best practice guidelines, and service standards. This process never ceases and ensures adequate backup protocols remain in place for our clients.

Should Alliant be selected as the partner broker with Sourcewell, we would embrace that relationship as a partnership and provide Alliant's Service Standard guidelines daily. However, in the unlikely event that any member fails to consistently adhere to the provided service standard minimums, Alliant is to encounter internal staffing changes, or Sourcewell and/or its participants are experiencing performance issues, we would ask that you escalate to Pat Moore or Chris Tobin directly. Sourcewell and/or its participant would have the ability to be involved in the selection process of this replacement. The proposed team members were selected for Sourcewell for many reasons including their excellent commitment to client service.

The Alliant Property and Casualty Servicing Approach

Your Alliant Service Team has a proven customer service philosophy and defined approach that has led to exceptional client service experiences and a 98% client retention. This approach is underpinned and deeply rooted by executing the following:

- > Attentive: We will treat this engagement with the utmost care; we will provide our services with a commitment to professionalism, trust and the highest level of personal and professional integrity.
- > Proactive: We are committed to understanding the goals and needs of public entities and providing our best service, consulting advice and deliverables. We will provide Sourcewell participants with innovative solutions and opportunities with an eye towards continuous improvement and risk transfer efficiencies.
- > Responsive: We will respond to client's needs in a timely and professional manner; we will return all voicemail and email communication in accordance with our agreed-upon service standard guidelines; we will deliver and review our work product on a timely and as-agreed basis.

Defined Client Service and Marketing Process

		<p>Alliant's Defined Client Service and Marketing Process is the framework for our business approach and a technical practice implemented in a manner that aligns with our client's goals. This process has been developed through our years of experience and is fully customizable to suit each client's needs. The Alliant approach provides consistency in quality service, checkpoints, and timelines for monitoring our jointly agreed upon service standards, and ensures the appropriate planning occurs well in advance of the expiration date. In addition, we use Quality Committees to continuously monitor the implementation of these best practice standards.</p> <p>The marketing process will begin by establishing a timeline based upon the expectations set forth by your participants to deliver all quotations and bind coverage in a timely manner.</p> <p>Key steps in our process include:</p> <ul style="list-style-type: none"> > Gather underwriting data. Alliant will collaborate with participants to gather key underwriting data required for a complete market submission. A complete data request that prioritizes necessary information will be provided to participants. We will compile the data into a detailed submission that includes key project information, detailed coverage specifications and requests for important coverage extensions. > Submit underwriting submission to select markets. Our market relationships are unmatched in the industry. The underwriting submissions we prepare are noted for their completeness. Your underwriters will know that our submission will portray your unique risks and operations correctly, succinctly and in a clear and easily understandable format. To the degree desired, we encourage meetings between you and the underwriters. > Our goal is to distinguish you from your peers, and we do so by creating first class underwriting presentations that demonstrate your unique risk characteristics. > Hold carrier meeting. In addition to the information provided in our marketing submissions, Alliant will host meetings to provide the opportunity for key members of your participants to present their risks to the carriers. This will also give them the chance to discuss any additional measures they have put in place to help mitigate loss. In addition, the carriers will be able to ask questions and visit sites, if necessary. > Obtain market quotations. After carriers submit their quotes, we will compile a comprehensive document outlining all quotes, terms and conditions, highlighting key differences. Alliant and participants will then jointly narrow down the field of carriers for further negotiation. > Final negotiations and carrier selection. Alliant will assist each participant with selecting a carrier and negotiate final pricing and coverage terms and conditions. Once a final selection is made, we will issue an order to bind coverage.
<p>30</p>	<p>Describe your ability and willingness to provide your products and services to Sourcwell participating entities.</p>	<p>Alliant's Service Philosophy is centered on forming integrated consulting and service teams that revolve around our clients. We aim to make our clients' lives easier by acting as an extension of their HR and Benefits team. We provide the resources to ensure the successful execution of benefit program strategies and offer day-to-day support for ongoing benefit program management.</p> <ul style="list-style-type: none"> • Regular Communication: We believe in maintaining regular communication with our clients. <ul style="list-style-type: none"> o Collaboration is best achieved through consistent contact. o We strive to be an integral part of our clients' teams, which require frequent communication. o The frequency and modality of formal meetings throughout the year are tailored to each client's specific needs, complexity, and ongoing projects. • Meetings: We expect to hold various meetings with our clients, including: <ul style="list-style-type: none"> o Pre-Renewal Strategy Meeting o Claims Experience Review (conducted through calls or webinars) o Renewal and Marketing Presentation Meeting(s) o Open Enrollment Meeting(s) o Annual Debrief Meeting o Bi-Weekly Team Check-in Calls • Annual Stewardship Reports: We provide annual stewardship reports that focus on accountability and transparency. These reports track the progress made towards achieving set goals and deliverables. • Responsiveness: We prioritize responsiveness, committing to a maximum 24-hour response time for calls or emails. <ul style="list-style-type: none"> o Our team is dedicated to assisting with billing disputes and diligently researching and resolving any claim and eligibility issues that may arise. o We also monitor the service provided by carriers and third-party administrators to ensure our clients receive the best possible support. • Data Analysis and Recommendations: By tracking claims trends and member services data, we can assess and make recommendations for plan changes. <ul style="list-style-type: none"> o We identify any employee education needs to improve the overall benefit program. • Accessible and Responsive Partner: Our service philosophy revolves around being an accessible and responsive partner to our clients. <ul style="list-style-type: none"> o We combine the strategic expertise and resources of a national consultant with the personalized, hands-on customer service of a local broker. o Our goal is to align our clients' benefits strategy with their overall business strategy and employee culture.

o We identify and address risks and cost drivers, develop affordable and compliant benefit programs, and provide an excellent experience for both employers and employees.

Gauging Client Satisfaction

At Alliant, we prioritize client success and satisfaction by following a simple and effective process:

- Asking, Listening, and Responding
- We actively engage with our clients to understand their needs and expectations.
- We listen attentively to their feedback and concerns.
- We promptly respond to address any issues or requests.
- Client Success in Meetings
- Client success and satisfaction are always on the agenda for every meeting, whether virtual, by phone, or in person.
- Benefits Service Calendar
- We use a Benefits Service Calendar to document and track the progress of your benefits program.
- The calendar serves as a record of Alliant's service commitments, ensuring accountability for their fulfillment.
- Employee Feedback
- This feedback helps us identify and address any employee satisfaction issues.
- Quarterly Check-ins
- The Alliant Account Executive for Sourcewell will check in with your executive management and benefits team quarterly, at minimum.
- Annual Stewardship Meeting
- We conduct an annual stewardship meeting with you to review program results from the completed plan year.
- This discussion includes overall client success and the potential need for any changes in Alliant's service delivery.
- Prompt Resolution

o Any unresolved concerns are escalated to the appropriate team members, and progress is monitored to ensure timely resolution.

Alliant has consistently worked to develop document review requirements, audit protocols, best practice guidelines, and service standards. This process never ceases and ensures adequate backup protocols remain in place for our clients.

Should Alliant be selected as the partner broker with Sourcewell, we would embrace that relationship as a partnership and provide Alliant's Service Standard guidelines daily. However, in the unlikely event that any member fails to consistently adhere to the provided service standard minimums, Alliant is to encounter internal staffing changes, or Sourcewell and/or its participants are experiencing performance issues, we would ask that you escalate to Pat Moore or Chris Tobin directly. Sourcewell and/or its participant would have the ability to be involved in the selection process of this replacement. The proposed team members were selected for Sourcewell for many reasons including their excellent commitment to client service.

The Alliant Property and Casualty Servicing Approach

Your Alliant Service Team has a proven customer service philosophy and defined approach that has led to exceptional client service experiences and a 98% client retention. This approach is underpinned and deeply rooted by executing the following:

- > Attentive: We will treat this engagement with the utmost care; we will provide our services with a commitment to professionalism, trust and the highest level of personal and professional integrity.
- > Proactive: We are committed to understanding the goals and needs of public entities and providing our best service, consulting advice and deliverables. We will provide Sourcewell participants with innovative solutions and opportunities with an eye towards continuous improvement and risk transfer efficiencies.
- > Responsive: We will respond to client's needs in a timely and professional manner; we will return all voicemail and email communication in accordance with our agreed-upon service standard guidelines; we will deliver and review our work product on a timely and as-agreed basis.

Defined Client Service and Marketing Process

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Key steps in our process include:

- > Gather underwriting data. Alliant will collaborate with participants to gather key

		<p>underwriting data required for a complete market submission. A complete data request that prioritizes necessary information will be provided to participants. We will compile the data into a detailed submission that includes key project information, detailed coverage specifications and requests for important coverage extensions.</p> <ul style="list-style-type: none"> > Submit underwriting submission to select markets. Our market relationships are unmatched in the industry. The underwriting submissions we prepare are noted for their completeness. Your underwriters will know that our submission will portray your unique risks and operations correctly, succinctly and in a clear and easily understandable format. To the degree desired, we encourage meetings between you and the underwriters. > Our goal is to distinguish you from your peers, and we do so by creating first class underwriting presentations that demonstrate your unique risk characteristics. > Hold carrier meeting. In addition to the information provided in our marketing submissions, Alliant will host meetings to provide the opportunity for key members of your participants to present their risks to the carriers. This will also give them the chance to discuss any additional measures they have put in place to help mitigate loss. In addition, the carriers will be able to ask questions and visit sites, if necessary. > Obtain market quotations. After carriers submit their quotes, we will compile a comprehensive document outlining all quotes, terms and conditions, highlighting key differences. Alliant and participants will then jointly narrow down the field of carriers for further negotiation. > Final negotiations and carrier selection. Alliant will assist each participant with selecting a carrier and negotiate final pricing and coverage terms and conditions. Once a final selection is made, we will issue an order to bind coverage. 																																																																																																																																			
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 Sourcewell Participating Entity types will have full access to our Solutions.	*																																																																																																																																		
32	Define any specific requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	There are no restrictions for participating entities in Hawaii and Alaska and in US Territories.	*																																																																																																																																		
33	Will Proposer extend terms of any awarded master agreement to nonprofit entities?	Yes	*																																																																																																																																		
34	In which states does your organization hold agency or individual insurance licenses?	Alliant Insurance Services, Inc. is licensed in all 50 states.																																																																																																																																			
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>Number of Public Entity (Benefits & P&C) clients by State.</p> <table border="1"> <thead> <tr> <th colspan="5">Distinct Count of Clients</th> </tr> <tr> <th>PE Client's Primary State/Address</th> <th>2022</th> <th>2023</th> <th colspan="2">2024</th> </tr> </thead> <tbody> <tr> <td>California</td> <td>2,438</td> <td>2,462</td> <td colspan="2"></td> </tr> <tr> <td>Illinois</td> <td>306</td> <td></td> <td colspan="2"></td> </tr> <tr> <td>301</td> <td></td> <td></td> <td colspan="2">310</td> </tr> <tr> <td>Texas</td> <td>147</td> <td></td> <td colspan="2">145</td> </tr> <tr> <td>147</td> <td></td> <td></td> <td colspan="2">173</td> </tr> <tr> <td>Minnesota</td> <td>113</td> <td></td> <td colspan="2"></td> </tr> <tr> <td>105</td> <td></td> <td></td> <td colspan="2">97</td> </tr> <tr> <td>Washington</td> <td>95</td> <td></td> <td colspan="2"></td> </tr> <tr> <td>97</td> <td></td> <td></td> <td colspan="2">98</td> </tr> <tr> <td>Arizona</td> <td>33</td> <td></td> <td colspan="2"></td> </tr> <tr> <td>35</td> <td></td> <td></td> <td colspan="2">38</td> </tr> <tr> <td>Florida</td> <td>31</td> <td></td> <td colspan="2"></td> </tr> <tr> <td>36</td> <td></td> <td></td> <td colspan="2">32</td> </tr> <tr> <td>Nebraska</td> <td>5</td> <td></td> <td colspan="2"></td> </tr> <tr> <td>6</td> <td></td> <td></td> <td colspan="2">34</td> </tr> <tr> <td>Maryland</td> <td>23</td> <td></td> <td colspan="2"></td> </tr> <tr> <td>27</td> <td></td> <td></td> <td colspan="2">27</td> </tr> <tr> <td>Nevada</td> <td>23</td> <td></td> <td colspan="2"></td> </tr> <tr> <td>23</td> <td></td> <td></td> <td colspan="2">26</td> </tr> <tr> <td>Ohio</td> <td>12</td> <td></td> <td colspan="2"></td> </tr> <tr> <td>15</td> <td></td> <td></td> <td colspan="2">25</td> </tr> <tr> <td>Oregon</td> <td>19</td> <td></td> <td colspan="2"></td> </tr> <tr> <td>17</td> <td></td> <td></td> <td colspan="2">16</td> </tr> <tr> <td>Pennsylvania</td> <td></td> <td></td> <td colspan="2"></td> </tr> </tbody> </table>	Distinct Count of Clients					PE Client's Primary State/Address	2022	2023	2024		California	2,438	2,462			Illinois	306				301			310		Texas	147		145		147			173		Minnesota	113				105			97		Washington	95				97			98		Arizona	33				35			38		Florida	31				36			32		Nebraska	5				6			34		Maryland	23				27			27		Nevada	23				23			26		Ohio	12				15			25		Oregon	19				17			16		Pennsylvania					
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36	What lines of insurance coverage does your organization offer public sector?	Alliant consults on the following principal lines of coverage: Employee Benefits, Retirement Consulting, Property & Casualty, Mergers & Acquisitions, Global Consulting, Workers' Compensation, Liability, Surety and Financial Services, Risk Management Consulting, Specialty Insurance Programs, Underwriting & Financial Services, Specialized Business Services, Preferred Vendor Program, Loss Control, Property Appraisal, and Third-Party Administration. Property and Casualty principal lines of coverage: Property, Boiler and Machinery, Earthquake, Flood, Wind, General Liability, Auto Liability, Public Officials, Directors and Officers, Employment Practices, Workers' Compensation, Crime, Bonds, Pollution, Cyber, Educators Legal, Medical Malpractice, Accidental Death and Dismemberment, Kidnap and Ransom, Discrimination and Construction.	
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.	Alliant is one of the largest Insurance Brokers and Consulting firms in the Nation working with all large national insurance carriers, all regional and local carriers along with all third-party vendors and point solutions. Alliant is licensed in all 50 states. Benefits: Alliant has worked with all the markets listed below and is a tier 1 broker in all the major markets. Although this listing is not comprehensive, the following are some of the largest carriers we utilize: Medical: Aetna, Anthem, Blue Shield, Cigna, HealthNet, Kaiser, United Healthcare Dental: Aetna, Ameritas, Anthem, Blue Shield, Cigna, Delta Dental, Guardian, Humana, MetLife, Principal, United Concordia, United Healthcare, Unum Vision: Ameritas, Cigna, EyeMed, Guardian, Humana, MES, MetLife, Unum, VSP Life/Disability: Cigna, Hartford, Lincoln, MetLife, Mutual of Omaha, New York Life, Principal, Prudential, Voya, Standard, Sun Life, Unum Voluntary Benefits: Aetna, Aflac, Allstate, American Fidelity, Cigna, Colonial, United Healthcare, Unum Prescription Drugs: Aetna (CVS), Anthem, Blue Shield, Cigna, Express Scripts, MedImpact, Optum, United Healthcare, Walgreens Property and Casualty Markets Alliant places over \$34B in premium volume with over 2,500 carriers (including domestic and overseas). The Alliant Public Entity practice is responsible for placing roughly \$2.3 billion in premium for our clients in both the domestic market and with	

international markets. To illustrate our market clout, the following table provides 2023 premium volume for our largest carrier partners by premium volume:

RANK	CARRIERS	2023 PREMIUM	A.M. BEST RATING
1	Chubb Limited	1.380B	A+
2	Lloyds of London	1.361B	A
3	Berkshire Hathaway Inc.	1.271M	A++
4	The Travelers Companies, Inc.	821.9M	A++
5	Munich Reinsurance Company	673.3M	A+
6	Zurich Insurance Group Ltd	638.7M	A+
7	Fairfax Financial	615.5M	A
8	Liberty Mutual Group	613.9M	A
9	American International Group, Inc.	544.9M	A
10	Progressive Corporation	483.1M	A+
11	AXA S.A.	418.1M	A+
12	Starr International Company, Inc.	401.7M	A
13	Tokio Marine Group	392.1M	A++
14	Markel Group Inc.	340.3M	A
15	W. R. Berkley Corporation	332.7M	A+
16	CNA Insurance Companies	309.9M	A+
17	Hartford Financial Services Group, Inc.	296.2M	A+
18	American Financial Group, Inc.	268.5M	A-
19	Everest Group, Ltd.	255.3M	A+
20	SOMPO Japan Insurance Inc.	220.1M	A+
21	Arch Capital Group Ltd.	213.9M	A+
22	Allianz SE	197.6M	A+
23	Factory Mutual Insurance Company	194.3M	A+
24	Old Republic International Corporation	188.8M	A+
25	QBE Insurance Group Limited	175.7M	A

What differentiates us from our competition is not just the access, but also our notable position within the market itself. With decades of relevant experience in the public sector, we have developed strong relationships with major global markets within the insurance industry. No other firm brings the depth of public entity brokerage experience, as well as the volume of public entity insurance premium placements to bear in the service of our clientele.

Meaningful Market Relationships

Because Alliant places (re)insurance for a considerable number of public entities across the United State, we have extensive experience determining which carrier partners best fits each client's needs. Alliant has access to virtually every domestic and global insurance market—either directly or through a wholesaler/intermediary. It is Alliant's practice to access markets directly whenever possible unless there is a strategic reason not to do so. Intermediaries are used selectively when direct access is not allowed, such as the European and Bermuda markets, or with certain domestic surplus lines underwriters. Additionally, if an intermediary can bring unique value, leverage, or a specific service to the client, they may then be considered. Use of intermediaries is a key discussion point during the Renewal Strategy Meeting and their use is vetted completely with the client as part of the strategic marketing plan. Alliant's philosophy for accessing a particular wholesaler is predicated on matching clients' needs with the expertise of the wholesale company. We have cultivated relationships with several intermediaries including AmWINS, Howden (London) or BMS (London).

Alliant Exclusive Programs

Alliant has developed numerous insurance programs that are only available to Alliant clients. These programs are in addition to our access to over 350 insurance companies in the standard insurance marketplace and have proven to be one of Alliant's greatest differentiators. The success of our program(s) is achieved by utilizing the strategy of group purchase. Alliant can leverage the combined size of the participating group to provide below market pricing, and broader coverage than what is available in the standard marketplace.

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?	<p>Yes, we specialize in several different industry verticals, but one of our largest practices is our Public Entity practice – dedicated to serving Schools and Public Entities. We represent many clients that participate in government risk pools, and we collaborate with each client to develop a multi-year strategy aligned with their cost management and recruitment and retention goals. Because the strategic plan is customized for each client, we can adjust and coordinate our services offered to align with the services offered by the risk pool. We would review the services offered by the risk pool and adjust our annual workplan to ensure it aligned.</p> <p>Alliant's Property and Casualty Public Entity vertical works with government risk pools across the Nation. In fact, we have been the broker and the marketing arm of the largest public entity pool in the nation for the last 40 plus years. Our team places the excess and reinsurance for pools programs along with bringing new members to the pool, which has recently expanded outside their home state with the help of Alliant. We treat all our clients equally, however based on the needs of the pool with their members, we do coordinate services models and standards as direct by both the pool and its participants.</p>
39	Describe how your agency regularly communicates and provides educational opportunities to your producing salesforce?	<p>Alliant's staffing policy is to recruit and hire experienced, seasoned industry professionals to fill the needs of our growing employee benefits practice. With that said, Alliant's staff undergoes extensive initial and recurring training. Many gain an even higher level of expertise to address the special needs of our niche clients. This ensures that our clients' benefits plans are properly designed, priced, and implemented to achieve the lowest total cost and greater peace of mind.</p> <p>The following are a few examples of the ongoing training and education that our employees receive to be prepared to meet the needs of our clients:</p> <ul style="list-style-type: none"> • HIPAA and Cyber Security training • Carrier/vendor continuing education for insight into current trends and products in the marketplace • Compliance: <ul style="list-style-type: none"> o Required annual 4-hour compliance training for every office/region (ERISA, COBRA, HIPAA, ACA, etc.) o Required "Compliance 101" training for every new hire o Bi-monthly staff training on compliance updates • Aspire: Alliant's formal Learning Management System (LMS) contains hundreds of training modules. <ul style="list-style-type: none"> o Managers assign internal Alliant corporate training through the LMS o Managers provide their staff with continuing education on advanced benefit products, healthcare innovation, computer software, and other topics through the LMS. <p>Alliant has a dedicated national trainer who rolls out additional programs to improve our employees' client support services.</p>
40	What local agency team specialists are available to work directly with public agencies?	<p>All Alliant employees in our 130+ offices across 35 states can work directly with public agencies.</p> <p>Our local specialists and Public Entity Practice Leaders in the following areas of the United States include:</p> <ul style="list-style-type: none"> • Northeast which includes Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, and Vermont. <ul style="list-style-type: none"> o Mike Honeycutt, Senior Vice President, Public Entity • Midwest which includes Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin. <ul style="list-style-type: none"> o Justin Swarbrick, Senior Vice President, Public Entity • 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. <ul style="list-style-type: none"> o Carleen C. Patterson, ARM-P, CIC, CRM, Senior Vice President and Public Entity and Higher Education Practice Leader. • West which includes Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, and Wyoming. <ul style="list-style-type: none"> o Patricia Moore, First Vice President Benefits Consultant. o Cathy Huynh, GBDS, Assistant Vice President and Programs Service Manager. o Pat and Cathy will be the relationship leaders for Alliant's work with Sourcewell's participating entities. o Chris Tobin, ARM-P, Senior Vice President, Public Entity. o Dan Howell, Executive Vice President and Public Entity and Higher Education Practice Leader.

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>Marketing samples have been attached under separate cover in the documents section under Marketing/Plan Samples.</p> <p>In partnership with the marketing team at Sourcewell, Alliant will create a Sales, Marketing, and Communications strategy for promoting this opportunity. Our efforts will target Sourcewell participating entities and prospective entities.</p> <p>We will also offer training to our internal sales and service teams, so they are equipped to promote the award to local entities.</p> <p>We will create and design a range of email marketing materials and direct mail pieces aimed at educating and informing participating entities about the award, while clearly outlining pathways to partner with Sourcewell and Alliant.</p> <p>We will also develop and host a series of educational webinars and roundtables. These webinars and roundtables will focus on topics relevant to the entities and will provide educational opportunities as well as an avenue to inform them of the Sourcewell award and value proposition.</p> <p>Alliant has a strong LinkedIn presence, and we would create a social media campaign aligning with our email/mail marketing strategy and promoting our online seminar/roundtable forums.</p> <p>Alliant's communication and marketing team will be responsible for designing, printing and distributing marketing and communication materials. This would include the following components:</p> <ul style="list-style-type: none"> • General Marketing Material • Enrollment Support Material • Proposal Material • Customized Presentations for Webinar and Seminar events • Mailing/Emailing Campaign material <p>Alliant also regularly attends and sponsors activities at a variety of Public Sector events. We would continue to attend these events and would be interested in coordinating joint sponsorship activities with Sourcewell.</p>
42	Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.	<p>Alliant leverages technology and digital data, including social media and metadata, to enhance marketing effectiveness and drive engagement. As outlined in response to question 41, Alliant maintains a robust LinkedIn presence, which serves as a cornerstone of our digital marketing strategy. In collaboration with Sourcewell, we would design a targeted social media campaign that aligns with our overarching marketing objectives to promote Alliant's services and Sourcewell's awarded contracts effectively.</p> <p>Our dedicated communication and marketing team equips staff with the tools and knowledge to maximize LinkedIn's potential. To date, the team has developed and shared more than 25 resources focused on optimizing LinkedIn use. These resources cover critical topics such as professional networking, identifying and connecting with prospects, creating engaging content to captivate audiences, and strengthening business relationships.</p> <p>By combining a strategic social media approach with ongoing staff training and digital tools, Alliant ensures our marketing efforts are data-driven, impactful, and aligned with both our goals and those of our partners.</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>Alliant will promote the agreements on behalf of Sourcewell. We would expect that Sourcewell would name us as an awarded supplier on the Sourcewell website.</p> <p>We will integrate a Sourcewell-awarded agreement into our sales process by including details of the award in the materials utilized during our sales process. We will also promote the award during our attendance at public entity conferences and as we prospect for new clients throughout the country.</p>

<p>44</p>	<p>Describe your insurance marketing philosophy and strategy for making carrier or solution recommendations?</p>	<p>Benefits: Alliant specializes in the Public Sector, and most our clients are public entities. We have extensive experience in developing and managing bid requests on behalf of our public sector clients and conduct such projects regularly. Alliant evaluates vendor services through an RFP and due diligence process designed to secure the best quality services and cost proposals for our clients. Regardless of the service (Medical, Dental, Benefit Administration, Online Eligibility, COBRA, etc.), Alliant ensures all vendors compete on a level playing field through comprehensive RFPs that delineate required services. We make vendors compete from service and pricing perspectives to leverage the most competitive proposals from the marketplace. Alliant understands that while changing carriers may be undesirable for employees, periodically marketing lines of coverage to other insurance carriers is necessary to ensure the most cost-effective and comprehensive coverage available. The Alliant team evaluates many variables during the renewal and marketing process to determine qualified bids and carriers. Examples of variables reviewed in the evaluation include:</p> <ul style="list-style-type: none"> • Network size and disruption analysis • Retiree coverage options • Reporting capabilities • Administrative efficiencies • Eligibility maintenance • Fee structure • Rx formulary listings • Employee and retiree educational materials • Data integration capabilities • Continuity of care provisions • Claim adjudication speed and accuracy <p>Property and Casualty: Marketing Strategy, Approach and Design Although we will collaborate with our clients to develop a list of goals and expectations, Alliant clients achieve the best results when we strategically and actively market their risks to respected high-quality underwriters. There can be strategies specific to certain lines of coverage and risks however, we believe the best results are achieved by competitive marketing for all lines of coverage our client purchases.</p> <p>Our marketing philosophy and strategy are tailored for each client and focused on their unique needs. Once we have established the goals for the renewal with our client, we match those goals with our knowledge of the marketplace. We then look to leverage any existing relationships the client might have in the marketplace coupled with our market relationships to achieve the best results. We do understand the importance of consistency and would look to the relationships you have with your current markets. Often, there are good reasons to maintain these relationships if they are viewed as "good partners" in the past. Additionally, we will identify key markets with aggressive pricing and broad terms.</p> <p>Comprehensive marketing routinely forces incumbent carriers to reduce their premiums; however, one must weigh the balance of "over-exercising" the market to one's detriment and obtaining pricing that is reflective of current market conditions. While we expect carrier terms and conditions to reflect the market, we also realize that constantly changing carriers based on pricing can be dangerous for continuity of coverage and in forging long term relationships that can be extremely beneficial under hard market conditions.</p> <p>What differentiates us from our competition is not just the access, but also our notable position within the market itself. With decades of relevant experience in the public sector, we have developed strong relationships with major global markets within the insurance industry. No other firm brings the depth of public entity brokerage experience, as well as the volume of public entity insurance premium placements to bear in the service of our clientele.</p> <p>Marketing Approach In terms of marketing the program to underwriters, there are three approaches that Alliant will consider, which have proven repeatedly to provide our clients with the most favorable results available to them. We would suggest pursuing all options in tandem to secure the best possible value.</p> <p>Our three approaches include the following and are described in detail, below: Market and Negotiate Terms with Your Incumbent Carriers. Market and Negotiate terms with Markets beyond the Incumbent Carriers. Evaluate Alliant's Proprietary Insurance Programs.</p>
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45	Describe in detail the procurement process your agency would conduct on behalf of public sector clients.	<p>Our approach to developing an RFP for a public entity follows these steps, but specifics often differ based on each client's policies and requirements:</p> <ul style="list-style-type: none"> • Establish bid goals and procedures. Discuss with the decision-making body (staff, committees, sub-committees, bargaining units, etc.) the goals of the bid. Establish clear objectives and timelines, including decision points for decision-makers. At this stage, we also establish the list of bidders and the way the bid will be conducted. • Scheduling. Schedule all the necessary meetings required to adhere to the bid timeline. This may involve multiple committees and require scheduling up to a year in advance, depending on project complexity. • Draft RFP Review. Alliant develops a draft RFP document, including relevant attachments, in accordance with the established objectives and timelines. The document (and attachments) is reviewed by the decision-making bodies to ensure it meets the discussed goals and objectives. Legal counsel often reviews the document to include any specific requirements (disclosures, hold harmless clauses, compliance notifications, statements of facts, etc.). • Final Approval for Release. The client approves the last version of the bid for release to the marketplace. • Release bid and manage bid process. <p>Alliant takes an interactive approach with our clients in developing bid requests, often tailoring the process to fit their specific needs. We assume the lead role throughout the process and provide clear guidance on strategy through design and bid management. We develop and recommend insurance carriers based on their financial stability. Alliant uses 1-4 financial rating agencies to provide insurer solvency reporting to our clients with A.M. Best being the gold standard, though all four ratings may be used, depending on what we are marketing. The ratings are reported to our clients in the marketing results section of our market analysis report.</p>
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?	Alliant does not charge a fee to insurance carriers, technology platforms, point solutions or any other company in order for those companies to receive opportunities from our organization.

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>Alliant will create a series of educational webinars and roundtable forums are offered to Sourcewell participating entities at no cost. These webinars and roundtables will focus on topics relevant to the entities and will provide educational and training opportunities as well as an avenue to inform them of the Sourcewell award and value proposition.</p> <p>For Clients</p> <p>Alliant includes ongoing client support as part of our core scope of services. This support is managed by your Account Executive and frequently involves participation by the subject matter experts on Sourcewell account team and their national consulting departments. These support services include, but are not limited to:</p> <ul style="list-style-type: none"> • Vendor management and issue resolution • Renewal management • Open enrollment management and support • Compliance communications, updates, and quarterly webinars/training • Employee communications • Pharmacy management • Alliant's scheduled program of financial and analytic reports • Assistance with wellness program management • Diversity, Equity, and Inclusion support services • Professional HR services and consulting on demand • Daily benefits assistance to HR on demand <p>HR Workplace Services (HRWS) is Alliant's strategic consulting partner for HR-related needs. Founded in 2009, HRWS collaborates with companies ranging in size from small group to 200,000 employees, across multiple industries throughout the United States. A dedicated team is assigned to Alliant's clients, whose members average over 20 years of industry experience. Please note that as a value-added service, core advisory and operational resources of HRWS are available to our clients at no additional cost. In addition, HRWS offers optional fee-based services, such as custom handbook development and non-discrimination testing, which may interest HR leadership.</p> <ul style="list-style-type: none"> • HR Advisory Support: Contact HRWS consultants by phone or email. Ask questions and receive guidance related to FMLA, EEOC issues, disabilities and leaves, harassment, terminations, immigration, local regulations, compensation, optimizing HR processes, and other areas of concern. • Employee Handbooks: Review of your current handbook with redlines and recommended edits. • Training: Access a "Video Vault" with short best-practice educational courses on a variety of key HR topics such as ADA, COBRA, ACA, leaves, hiring and termination, and

employment law basics, to name a few. There is also employee and manager harassment training, which is state/area-specific.

- HR Content and Collateral: Obtain HR checklists, forms, and sample policies—either for direct use or as a quality check on current content.

Educational Events - Alliant Employee Benefits Learning Academy - There is an extraordinary amount of innovation in the employee benefits world, and it is not always possible to cover the variety of trends in the marketplace during our face-to-face meetings. As a result, we have created the Alliant Employee Benefits Learning Academy which consists of virtual educational events throughout the year to keep our clients informed about marketplace trends and solutions that may be relevant for their employee benefit program. Please see below for topics we have discussed in the past and some recent events we have hosted.

For Employees

Your plan members can engage Alliant’s Benefit Advocate service during Open Enrollment and throughout the year to obtain timely, professional assistance with claims and other benefits questions or concerns. Among the areas of covered support: benefit questions or clarifications; enrollment and eligibility questions;

- Open Enrollment support; resolution of claims and coverage issues; denied appeals; prescription problems;
- HSA and FSA (if applicable);
- COBRA inquiries.
- Employee Awareness Meeting
- Open Enrollment Review of Options & Changes

Property and Casualty:

Market Updates and Knowledge Sharing

At Alliant, we believe our clients are better informed and prepared to make decisions around their program because of our consistent and transparent approach of sharing market updates. This knowledge sharing underpins every client engagement and allows for healthy strategic discussions and planning. In addition to our regular conversations and meetings with your team on these topics, Alliant provides additional publications and materials that are provided to you on a regular basis. A sample of those include:

Quarterly Market Updates – This report details the current market environment by line of coverage and offers insight into future rate forecast based on industry events and trends. Our senior product line experts and industry leaders contribute to this report to ensure granular detail is provided to our clients.

Alliant Public Entity Newsletter and Podcast - In the Public Eye is our quarterly newsletter including articles and informational items focused on Public Sector Risk Management and Insurance. This publication includes several topical reports ranging from Alternative Risk Financing considerations, drone exposure, to climate change and its potential affects, to cyber related issues and more. In 2021, we expanded In the Public Eye to include a bi-weekly podcast series devoted to issues around public entity.

Quarterly Public Entity Newsletter: A wide range of industry topics are addressed in these publications to ensure our clients stay abreast of matters that may affect their operations and insurance programs.

Industry Alerts: Industry alerts are distributed to help educate our clients on an as needed basis. Most recently, we distributed an alert on preparing for windstorms with tools to assist stakeholders prepare for and mitigate loss from the heavy storm season.

Fact Sheets: We have over 250 fact sheets in our library that can be accessed through Alliant Connect or through our Risk Control Hotline or email request free of charge.

Videos: Safety videos are provided to Alliant clients upon request. We have 100’s of topics in our video library.

On-Line Claims & Safety Training: Alliant has the capability of providing on-line training services.

The following is a sample list of topics where we have identified and designed specific training sessions to resolve issues faced by our public entities:

Special Events Program

Cyber Liability / Cyber Claims

Monthly PEPiP Webinars

Crime Coverage

Insurance Requirements in Contracts

Boiler and Machinery

How to Manage a Large Loss

Train-the-Trainer Seminars (Sexual Harassment Training)

Employee Fire and Safety Training

Liability Accident and “Near Miss” Investigation and Root Cause Analysis for Supervisors and Managers

Preventing Mold Claims

Preventing Water Damage losses

Building Security Planning

Testing Life Safety and Fire Protection Systems

Sewer Backup Response, Guidelines and Resources Safety Committee Set-Up

Making Pavement Maintenance More Effective

Performing Sidewalk Liability Assessments

Flagger Training

Drug Testing and Employment Issues
 Police Liability Issues
 Fire Liability Issues
 Park / Playground Safety
 Swimming Safety
 Building Inspections
 Emergency Action Planning
 Preventative Maintenance
 Environmental Impairment Liability
 Loss Control for Mutual Aid – Intergovernmental Agreements
 Volunteers Liability Issues
 Indoor Air Quality
 Violence in the Workplace

Special Events Program
 Cyber Liability / Cyber Claims
 Monthly PEPiP Webinars
 Crime Coverage
 Insurance Requirements in Contracts
 Boiler and Machinery
 How to Manage a Large Loss
 Train-the-Trainer Seminars (Sexual Harassment Training)
 Employee Fire and Safety Training
 Liability Accident and “Near Miss” Investigation and Root Cause Analysis for Supervisors and Managers
 Preventing Mold Claims
 Preventing Water Damage losses
 Building Security Planning
 Testing Life Safety and Fire Protection Systems
 Sewer Backup Response, Guidelines and Resources Safety Committee Set-Up
 Making Pavement Maintenance More Effective
 Performing Sidewalk Liability Assessments

Flagger Training
 Drug Testing and Employment Issues
 Police Liability Issues
 Fire Liability Issues
 Park / Playground Safety
 Swimming Safety
 Building Inspections
 Emergency Action Planning
 Preventative Maintenance
 Environmental Impairment Liability
 Loss Control for Mutual Aid – Intergovernmental Agreements
 Volunteers Liability Issues
 Indoor Air Quality
 Violence in the Workplace

Industry Conferences

Along with our rich history as public entity specialists, Alliant is also an active supporter and member of numerous Insurance and Public Entity Associations. These include Public Risk Management Association (PRIMA), State Risk and Insurance Management Association (STRIMA), University Risk Management Association (URMIA), Risk Management Society (RIMS), and the Association of Governmental Risk Pools (AGRIP). As a firm, we also support a few local PRIMA chapters including CO, MN, VA, MD, SC, NC, GA, FL, TX, TN, AZ, MI, OH and others.

In fact, these organizations often look to us to provide insight regarding the state of the public entity market. On many occasions, members from our team have been asked to speak, or to give presentations for the attendees of these organizations' annual conferences. Our deep involvement with these organizations means we can remain at the forefront of risk management issues that directly impact our clients and provides value to our relationship beyond fees and revenues.

Annual Public Entity Property Underwriting Conference

Prior to each renewal term, our team arranges meetings with key Public Entity underwriters from insurance hubs around the globe. Historically, we have registered more than 65 underwriter attendees primarily from London, Bermuda and throughout the United States. These professionals focus on writing large, complex property programs with total insurable values in the billions and with significant natural catastrophe exposure. These annual meetings allow our clients the unique opportunity to cultivate relationships with critical global insurance capacity in a focused environment, eliminating the distractions often associated with significant risk management and insurance conferences.

In these forums, markets – both underwriters, and more senior decision makers - and the clients can have productive dialogue about their key exposure differentiators. In a single day, the superior components and nuances of your program are presented to the marketplace in

		<p>a method designed to highlight the most important data and generate the most favorable renewal outcomes for your program.</p> <p>Clients that have attended this conference in the past can attest to the effectiveness of the small group environment and the positive renewal impact experienced repeatedly when compared to the industry norm. The feedback from both clients and underwriters confirms that there is no more efficient or productive setting for market meetings offered by our competitors.</p> <p>Insurance Requirements in Contract Manual (IRIC) and Training We collaborate with our clients to serve as an on-demand educational resource to translate contract language into real-world implications including availability and benchmarking of coverage expectations. This helps stakeholders understand the inherent risks with waivers, when it is possible to accept that risk, and when alternatives are possible. We regularly review contract insurance and indemnification language. We know that during business, the City regularly enters various contracts that may affect your risk management and insurance program.</p> <p>Your core account team will assume primary responsibility for this function and will collaborate closely with other associates, including our corporate attorneys and claims counsel, as needed. We review the following areas:</p> <ul style="list-style-type: none"> • Contract for new exposures that should be addressed in your insurance program. • Indemnification agreements. • Insurance requirements of both parties. <p>We can help with the following:</p> <p>CONTRACT/AGREEMENT/RFQ REVIEW Indemnification provisions Coverage descriptions Waiver of subrogation Deductible acceptability and the appropriate methods of securing payment or financing Administrative responsibilities such as certificates, audits, etc. Cancellation provisions Claim reporting and settlement methodologies Contractor required insurance coverages Adherence to the safety policies and procedures While we are not a law firm and are unable to provide legal advice, we can add valuable insight into the insurance wording necessary in general contracts. We can provide wording specifically related to insurance contract provisions.</p> <p>Our assistance would extend to contract wording related to some or all the scenarios identified below:</p> <p>EXAMPLES OF CONTRACTS Lease Loan Vendors (maintenance, service, products, and outsourcing) Development/construction contract Purchase/sale agreement Special events Staffing contracts including independent contractors</p> <p>Many public entities have spent countless hours and countless dollars updating internal contract requirements. As a value-added offering, Sourcewell will have access to Alliant's IRIC Manual. The IRIC Manual is available to our client's staff electronically and in hardcover. It was designed as a tool for procurement and risk management departments, assisting them with evaluating risk exposures and the required insurance language/minimum limits. The IRIC Manual is updated on an annual basis and details recommended insurance requirements for vendors collaborating with our clients. The manual provides guidance to your staff involved in securing contracts and is offered at no additional cost.</p> <p>As part of our proposed service to your members, Alliant offers one full or two half-day training presentations on the concepts contained in our IRIC Manual. This training can be virtual or in-person, whatever is more convenient to the client's staff. Additionally, our staff is available to help answer contract-related questions.</p>
48	Describe any technological advances that your proposed Solutions offer.	<p>Our proposed solutions offer several technological advances to enhance benefits expertise and operational efficiency. These include:</p> <ul style="list-style-type: none"> • HR Technology Practice: Our HR technology practice is a shared service within Alliant, with expertise in process engineering and system technology related to Benefits, HR, and Payroll solutions. This team helps clients improve the use of existing technology solutions, select innovative technology, and provide implementation support. This is an optional service, and fees may apply. • Proprietary Tools: We utilize proprietary tools such as Alliant Analytics, which securely stores detailed health data for over 1.7 million plan members, and Claros, a plan value

modeling tool that uses sophisticated algorithms to measure the impact of plan design changes.

- Quote-LinQ: This technology-based RFP process improves the efficiency and effectiveness of the stop loss placement process by providing direct access to Alliant's preferred stop loss carrier partners and reducing carrier declinations.
- Vendor Solutions Practice: This practice leverages technology to evaluate products and services focused on implementation ease, superior pricing, and service.
- Alliant Access Network: Our supplier diversity program, launching in January 2025, will track, identify, and encourage work with businesses owned by underrepresented groups through our partnership with TealBook, a supplier intelligence platform.
- Employee Wallet Solution: Developed in collaboration with vendor partners, this solution offers an Amazon-like online shopping experience for employees, providing access to vetted providers and discounted prices for various essential items and services.

Technology Resource Platforms

Alliant's commitment to technology in our business practices is significant and demonstrated through our recent designation as an InformationWeek Elite 100 winner. This prestigious designation recognizes the most innovative users of business technology in the United States. We offer tools empowering our clients to make sound business decisions that propel their organizations forward. While there are many Alliant technological capabilities we could highlight, we will focus on a few systems we believe are most relevant to our clients. These systems significantly aide in the management and organization of documents, reports, information, and communication during the contract, at renewal, and beyond:

AlliantConnect

AlliantConnect is a secure, easy-to-use portal that enables you to easily access and manage your insurance information from any Internet connection at any time. Your customized portal provides you with a transparent view into your insurance business through easy management and access to all insurance related documents: policies, binders, invoices, proposals, and certificate issuance, etc. In addition, important dates, deadlines, and announcements are also available through the portal, along with direct access to your service team. All client data is secured to the appropriate account teams, and the database itself and all backups are stored in an encrypted format. In addition, all document changes are archived for audit history.

AlliantConnect Property Schedules

Maintaining accurate and detailed information for buildings, and other insurable property, is the single most important thing you can do to enhance your stature in a property underwriter's mind. This is especially true in a hardening insurance market where data credibility is invaluable. Our property schedule database program, OASYS-Net, helps our clients maintain good underwriting data. Features include tracking Construction, Occupancy, Protection Exposure, Geo-codes, Values, Square footage, and other critical location details. Reporting capabilities include export to both Excel and PDF.

Certificate Handling

CSR 24 Certificate Management System

We utilize CSR 24 to provide 24-7 access to certificate requests and history. This is a user-friendly product that can allow multiple client users from the same organization to request and manage certificates. CSR 24 is available free of charge to all our clients.

The maximum turnaround time for issuing certificates is 24 hours. Our web enabled product allows flexibility in responding to customer needs.

Track Vendor Certificates:

Set up and maintain your own list of certificates provided to your vendors.
Sort your list by agency, line of coverage, provider name, expiration date, etc.

Request Certificates of Insurance:

You no longer need to fax or call to request a certificate of insurance for property coverage. Complete and submit the request to Alliant online. Certificates can be emailed in a secure PDF format to the certificate holder.

Reports & Exports:

Vendor Certificate Tracking – easily creates a list of overdue, upcoming or all certificates as a formatted report to Excel export. Formats for mailing labels are also available.

Incoming certificates will be reviewed within one business day to ensure:

- Compliance with contractual indemnification requirements.
- Compliance with coverages/limits.
- Compliance with special working/additional insured requirements.
- Compliance with AM Best/carrier rating requirements

Web Based Safety Resources – Alliant Risk Management Center

The Alliant Risk Management Center (RMC) is a unique web-based software suite of safety and risk management tools designed to empower your organization's risk prevention efforts. As part of our transition process, we will host a virtual demo. Complimentary access and training will be provided to those individuals designated by the RMC Director.

The RMC allows you to reduce risk and improve workplace safety by creating effective risk mitigation programs. It is easy to access and use and provides a cost-effective risk reduction and safety center for your entire organization. Alliant's Risk Management Center is right for any organization wanting to proactively manage risk exposures to reduce claims, losses, and associated costs.

Safety Library—Access a database of document templates and training courses, created to help companies mitigate risk and reduce losses.

Online Training—Deliver employee safety training efficiently and effectively.

Incident Management Tools—Automate safety audits, field inspections, and corrective action reporting while complying with OSHA reporting requirements.

HR Compliance Solutions—Access HR best-practice templates, training, news alerts, and expert advice.

The RMC provides tools to not only drive your TCOR by reducing frequency and severity, but can also enhance your compliance efforts through the following tracks:

COI Track Safety Observation Track

Manage the Certificate of Insurance (COI) process and ensure your business is protected from unexpected liability. Perform and track safety observations and demonstrate job compliance.

Incident Track Job Description Track

Report claims and reduce incidents. Track employee injuries and related time off work, conduct incident analyses, and run OSHA 300 Logs. Build job descriptions that clearly communicate employee responsibilities and job-related health and safety requirements

SDS Track Training Track

Comply with the new Globally Harmonized System. Automate your entire employee training process. Schedule, track, and document training with a database of training titles.

Audit Track Online Risk Management Library

Create audits, surveys, questionnaires, and self-assessments. Access a multitude of bilingual risk management documents and resources.

HR Essentials Loss Control Inspection Services

Achieve HR compliance, enabled through online educational materials, an HR & Benefits library, and access to on-demand experts. Attain certified experts to analyze current workplace conditions and environmental waste disposal programs, conduct on-site training, and assist with the management, tracking, and reporting of compliance issues

BBS Track

Cultivate a safety culture throughout your organization with a Behavior-Based Safety (BBS) Program. Ensure employees are doing their jobs safely

<p>49</p>	<p>Describe any “green” initiatives that relate to your company or to your Solutions, and include a list of the certifying agency for each.</p>	<p>Outlined below are the key initiatives we have undertaken to promote sustainability within our organization. These measures collectively show commitment to energy efficiency and sustainability. By integrating these practices into our operations, we can contribute to a greener future while delivering exceptional service to our clients.</p> <ul style="list-style-type: none"> • Travel Protocols: We understand that travel contributes to carbon emissions and energy consumption. We have implemented various measures to minimize our travel requirements to address this concern. We encourage virtual meetings and videoconferencing as an alternative to in-person meetings. By leveraging modern communication technologies, we have significantly reduced our travel-related carbon footprint while maintaining effective business operations in service to our clients. • Reduced Workforce Commute: With many employees working from home several days during the month, we have significantly reduced commuter-related energy consumption and emissions. Our remote work policy promotes focused client service and work-life balance while minimizing the environmental impact associated with daily commutes. We believe in providing employees with a flexible and sustainable work environment that supports their productivity and well-being. • Waste Reduction: We prioritize waste reduction through comprehensive shredding and recycling programs. Our shredding program ensures sensitive documents are securely disposed of and recycled appropriately, minimizing waste going to landfills. We have implemented recycling practices throughout our office spaces, encouraging employees to use minimally and recycle paper, plastic, glass, and other recyclable materials. These initiatives align with our commitment to reducing waste. • Paper Reduction: We have significantly reduced our paper use over the last ten years. Digital document management tools enable us to store, share, and collaborate on documents electronically, eliminating the need for extensive printing and paper usage. This initiative has not only reduced our ecological and storage footprint but has also improved efficiency and streamlined our workflows. • Reduced Leased Office Space and Furnishings: Recognizing the environmental impact of office spaces, we have implemented strategies to minimize our leased office space and furnishings. By optimizing our office layout and encouraging flexible work arrangements, we have reduced our overall office footprint, reducing our energy consumption for heating, cooling, and lighting and promoting a collaborative and dynamic work environment for our employees. • Efficient Leased Buildings: We prioritize leasing buildings that are energy efficient and aligned with our sustainability goals. We carefully evaluate potential office spaces based on their energy-efficient features, such as LED lighting, efficient heating and cooling systems, and proper insulation. Additionally, we prioritize buildings that have implemented water-saving measures, including modified toilets, to reduce water consumption and conserve this valuable resource. • Reduction of Harmful Chemicals: We have implemented stringent safety measures to protect our employees from viruses and other harmful contaminants. While we do not directly control the specific cleaning services provided by the buildings we lease, we prioritize using products and disinfectants designed to ensure the safety and health of our workforce. As a company, outside of the buildings we lease, we do not produce or distribute chemicals or products.
<p>50</p>	<p>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>	<p>Employee Benefits Alliant’s employee benefits practice comprises 1,672+ benefits professionals, serving over 9,800+ clients, ranging in size from 10 employees to the Fortune 500. We select and coordinate our comprehensive resources to meet each client’s specific needs, addressing such areas as:</p> <ul style="list-style-type: none"> Strategic Planning Plan Funding and Design Financial and Data Analytics Pharmacy Consulting Compliance Vendor Management Open Enrollment Employee Communications and Engagement Benefits Administration EAP & Supplemental Mental Health Solutions Health, Wellness & Productivity Management Clinical Informatics Absence Management Disability, Life, and Voluntary Benefits Executive Benefits Benefits Technology Consulting Global Benefits Mergers and Acquisitions Voluntary Benefits* HR Technology Consulting*

Retirement Consulting*

HR Consulting* (Compensation, Organization Development, Total Rewards, Outsourcing)

These are separate divisions from our Employee Benefit Consulting Division (with separate fees)

Alliant is a full-service brokerage and consulting firm that provides a variety of services to meet the needs of an entire range of client sizes, funding arrangements, and product configurations. Regardless of the size of our clients, Alliant does not follow a "one size fits all" approach. We provide custom solutions to our clients, which is determined by the unique individual challenges that each client faces.

Below is a condensed list of our Employee Benefit Brokerage and Consulting services:

Strategic Planning - Benefits program management is not a one-time event, but an ongoing journey. Alliant collaborates with each client to develop a multi-year employee benefits strategy aligned with their cost management and recruitment and retention goals for the district. We manage and maintain an annual work plan on behalf of our clients, to ensure action items and deliverables are met.

Cost Management and Stability: Alliant represents our clients in all negotiations with insurance providers, third-party administrators, networks, vendors, etc. Besides presenting direct marketplace options, the Alliant Employee Benefits Program for Non-Profits offers both medical and ancillary coverages for non-profit employer groups nationally. By leveraging our carrier and vendor relationships, Alliant created comprehensive and robust benefit options that have a proven track record of cost savings while ensuring employees receive the holistic benefits they deserve.

Data Analytics: For self-insured clients, Alliant's best-in-class analytical tools specifically related to benefits/contribution design can help define strategies to meet challenges that employers may face.

Benchmarking: Your Alliant team will provide meaningful benchmark data each year. Our benchmarking approach is highly customized to avoid comparisons to obsolete and stale data. Designing and maintaining a state-of-the-art benefit plan allows our clients to attract and keep talent. All our benchmarking services are included with our service platform. As part of our standard process, we will review plan design, funding and purchasing alternatives, provide benchmarking and submit recommendations for changes in line with your short term and long-term goals.

Renewals: Alliant will represent Sourcewell in all negotiations with insurance providers, third-party administrators, networks, vendors, etc. Alliant's size and market leverage allows us to leverage and negotiate from an extraordinarily strong position with the carriers.

Underwriting and Actuarial Support: Alliant maintains a Technical Underwriting & Actuarial Unit staffed with seasoned underwriters and in-house actuaries that all possess previous carrier underwriting backgrounds and experience. This unit will play a key role in the negotiation of renewal premiums and plan design options through the evaluation of utilization patterns, claim experience, plan costs, and demographic changes for our large, self-funded clients.

Stop Loss Services: Alliant is an expert in stop loss insurance, a complex and often misunderstood product of employee benefits. We have a dedicated team that analyzes the market and develops strategies tailored to each client's needs. With our preferred pricing relationships, we can design a competitive and protective stop loss strategy.

Alternative Funding Expertise: Our dedicated team of underwriters and actuaries who specialize in alternative funding arrangements. They have extensive experience in fully insured, minimum premium/participating contracts, and self-funded options. This team plays a crucial role in evaluating alternative funding options and providing ongoing support to our consultants in areas such as claims analysis, renewal evaluation, reserve calculations, and claims projections. We can help assess alternative funding options that can lower costs without compromising employee benefits. Please see below for some of the customized solutions we offer.

Vendor Management: Alliant commands deference from key carrier partners because of our membership numbers. We optimize their service models to meet client requirements and obtain longer-term commitments. We ensure clients benefit financially from these commitments. Audits help identify and remedy shortcomings. Alliant develops performance standards and guarantees for benefit plan providers, monitoring results monthly and advising clients on vendor performance. We also perform claims operation audits to validate results and ensure compliance with negotiated plan provisions.

Compliance and Regulatory Support: Alliant retains health and welfare attorneys dedicated to educating and supporting our consultant staff and provides updates on new developments, legislation, regulations, and practices that affect proper employee benefit plan administration, especially regarding Health Care Reform.

Communications & Engagement (Exhibit 6): We take a multi-generational approach in communicating and educating employees, which allows them to receive information in the form that is best for them. Whether it is print, electronic, video, or via a smartphone app, we can ensure that your employees, from the office personnel to the field and operator employees, will have the knowledge to make the best health care decisions for their family.

Alliant Medicare Solutions (AMS): offers Medicare education and enrollment services to employees, friends, and family, whether they will be retiring or continuing to work. AMS provides compliant communications for the entire population, including Medicare specific communications that can be sent by the employer or by AMS. The educational materials include videos and live Medicare 101's. The Complimentary service is no cost to clients and can be offered to employees, family and friends. There is an optional buy-up premium program also available.

Alliant Individual Health Solutions is a new Alliant concierge program to help employees who are ineligible or cannot afford coverage for themselves or their dependents find affordable coverage and identify eligibility for premium subsidies, as applicable.

Voluntary Benefits Consulting - We believe that voluntary employee-paid benefit plans can augment and increase the perceived value of a core employee benefits program at no additional cost to employers. Alliant will advise on how to incorporate a wide range of enrollment, technology, and employee communication services with voluntary benefits. Below is a list of are optional Employee Benefits services (fees may appl). The Alliant team will work with Sourcewell to curate a scope of services that aligns with your culture and meets your employee benefit program goals and objectives.

Alliant Human Capital: With tactical and strategic service offerings, we partner with you to fundamentally prepare and execute for the future through holistic people strategies that help solve your toughest HR, organizational development, and compensation challenges.

Alliant's Absence, Disability, and Life (ADL) Practice provides end-to-end service from consulting to actuarial, to underwriting, fiscal management, clinical audits, claims review and forecasting, communications, and more. A full team of legal and compliance experts backs our ADL-focused team, too, helping you navigate the ever-expanding local, state, and federal regulatory environment.

Alliant Retirement Consulting: Alliant's Retirement Consulting practice currently services approximately 500 clients with over \$10 billion in assets under management. Each retirement client has access to a dedicated staff to assist with matters related to investment strategy, client service, and compliance matters. We offer a comprehensive due diligence process to ensure that clients are meeting fiduciary obligations. Our core services fall under 3 main categories: Fiduciary Liability Reinforcement, Investment Services, and Vendor Search & Benchmarking.

LifeBalance: LifeBalance is an Alliant company, offers a turnkey customizable, well-being focused discount network on a user-friendly platform. With LifeBalance, employees can enjoy more the things we all love—fun family time, health fitness, travel, electronics, apparel, the great outdoors, and a good deal.

- Customizable and easy to implement, LifeBalance makes it easy to deliver comprehensive, well-being-focused employee discounts.
- With over 20,000 recreational, cultural, well-being, and travel related vendors, the discount network ensures meaningful savings available to all, regardless of age, location, income, ability, and interests.
- LifeBalance can assume management of existing employee discounts, ensuring those savings are current and listed on the discount platform with other savings.
- With a dedicated account manager and customer service team, clients and employees are fully supported, reducing work on HR and Benefit teams.

Benefit Advocacy: Alliant's National Benefit Advocates is an internal service that provides professional assistance to plan members with claims and benefits inquiries. Unlike outsourced call centers, our Benefit Advocates are fully owned and managed by Alliant. They are licensed benefit professionals who offer support in various areas, such as benefit questions, enrollment, claims resolution, and more. Each client has a dedicated advocate team for personalized assistance, and Alliant maintains control over service standards and metrics. The service is HIPAA-compliant, offers multi-lingual support, and keeps records of interactions. We use Salesforce Service Cloud for case management and 8x8 for reporting. The service is available Monday to Friday, 5:00 AM to 5 PM PST.

Property and Casualty:
Alliant is the nation's leading public-entity-focused insurance brokerage firm. Our extensive list of public entity clients confirms our abilities as the recognized leader, and we are proud of the accomplishments they represent. We are committed to our reputation as an aggressive broker working diligently to meet our client's needs. As a result of this client-centric approach, our retention rate is 98%—a testament to our delivery of superior services and processes.

Dedicated Public Entity Practice
At Alliant, we are proud of our long industry tenure and leading position in serving our Public Entity clients. We continue to heavily invest in this sector and have a highly experienced team of more than 300 associates that are exclusively dedicated to the public entity community.

Significant Public Entity Experience
Your team will draw upon our extensive experience and exceptional market relationships to leverage the most cost effective and comprehensive program for each participant. This approach will allow us to fill the program to the required limits to include "best in market" policy terms and conditions.

Hyper Focused Service
We will thoroughly understand the participant's operations, goals, risk profile and exposures. We will embrace the service commitment associated with each participant and exceed your expectations in every engagement.

Industry Leading Analytics
Alliant's analytic tools will provide participants with clear projected results that will give them the knowledge and insight they need to make informed decisions regarding all aspects of their property and liability program.

Collaborative Marketing Approach that Enhances Market Relationships
Collaborating with each participant, Alliant will develop proactive, long-term strategic planning and goals. We will embrace and foster strong relationships in the insurance market that will

provide stable and supportive program options. This will be enhanced through our annual Public Entity Property Underwriting Conference that allows for a unique client/ underwriter/ broker engagement.

Global Market Access

Our unique structure allows us unencumbered access the global insurance market through the utilization of the absolute best resources and intellectual capital available in the industry.

Unwavering Commitment to Superior Claims & Risk Control Advocacy

Through our seasoned team of claims professionals, we will drive successful outcomes and recoveries associated with catastrophic losses. This will also involve pre-loss planning and constant communication with all stakeholders during all phases of a catastrophic event.

Alliant Exclusive Programs

Alliant has developed numerous insurance programs that are only available to Alliant clients. These programs are in addition to our access to over 350 insurance companies in the standard insurance marketplace and have proven to be one of Alliant's greatest differentiators. The success of our program(s) is achieved by utilizing the strategy of group purchase. Alliant can leverage the combined size of the participating group to provide below market pricing, and broader coverage than what is available in the standard marketplace.

We believe the development of successful public entity programs demonstrates Alliant's long-term commitment and unmatched level of experience in the public sector. Our interest in maintaining these programs and developing additional solutions shows a long-term vision and focus that our competitors lack. We have included a brief overview of some of the programs that may be of interest.

offered through other property policies. Each year the program grows, and this growth allows for improved pricing and coverage for our clients.

To further illustrate the broadness of the form, here is a list of APIP's program highlights:

\$1 billion all risk limit per occurrence.

Coverage not limited to schedule.

No coinsurance clause.

Earthquake and flood coverage available.

Automatic acquisition for newly acquired locations up to \$100 million in value (\$25 million for no additional premium).

Course of construction coverage for new and renovation projects up to \$50 million.

\$100 million limit for boiler and machinery.

Includes coverage sabotage and terrorism.

Includes coverage for cyber liability (1st and 3rd party).

Includes coverage pollution liability and cleanup (1st and 3rd party).

Includes coverage for vehicles and mobile equipment on a replacement cost basis.

\$5,000,000 per occurrence for Tax Revenue Interruption even if these specific values have not been reported (if reported higher limits apply). Not all carriers will provide Tax Revenue Interruption coverage, let alone a sub-limit when these values have not been reported.

Public Risk Innovation, Solutions, and Management (PRISM)

PRISM is believed to be the largest property & casualty insurance pool in the country.

Established in 1979, and historically based in California, it provides a suite of coverage solutions to public entities and pools. On July 1, 2016, PRISM established a captive

insurance company, the Excess Insurance Organization (EIO). Alliant is excited to offer EIO's

Public Entity Liability (including Law Enforcement Liability) to pools and large self-insured

entities nationwide. EIO will consider insuring portfolios in a variety of ways, including quota

share, or on a \$5M lead layer or excess layer basis, both insurance and reinsurance.

Premiums are non-assessable, and likewise not subject to dividends, and coverage is

backed by AM Best "A" rated insurers. No collateralization is required. Benefits include

increased purchasing power in leveraging the marketplace to maximize coverage while

minimizing cost, additional market capacity, and participant directed insurance provider.

Services available include Target Solutions, Webinars and PRISM TV, EPL consulting

services, Legal counsel services, Toolbox of risk control best practices, and Contracts with

over 30 service providers and pre-negotiated rates.

Alliant National Municipal Liability Program (ANML)

This joint purchase program provides a program limit of \$10 million per occurrence with no

aggregate limits except completed operations. The program is competitively priced and has

boasted substantial growth each program year. ANML program highlights include:

Manuscript excess policy provides coverage for general liability, auto liability, public officials

E&O, and employment practices liability within a single policy.

Occurrence based public officials, police professional, and employment practices liability (EPL).

Flexibility to accommodate low deductibles and high retention attachment points.

Broad coverage 'give back' under inverse condemnation exclusion.

Carrier will reimburse 50% (up to \$250,000) of defense costs spent if the insured is successful in defending an EPL claim.

National Aircraft Liability and Hull/Airport Liability Insurance (NALIP/NAMP)

Since 1988, Alliant has been serving the aviation insurance needs of public entities

		<p>throughout California. Ten years ago, Alliant was expanding of our longstanding CSAC-EIA/PRISM Airport Program by creating the California Airport Liability Insurance Program (CALIP). We have since expanded and rebranded these two programs to offer coverage outside of California and rebranded to: the National Airport Liability Insurance Program (NALIP) and the National Aircraft Municipal (NAMP). The NALIP/NAMP program(s) have allowed us to utilize economies of scale to leverage the aviation marketplace for our clients who are responsible for protecting the aviation risks of their respective cities. Our programs offers broader coverage, for example, sublimits that are much higher than what you can find in the open market. We have over 50 airport clients that benefit from these programs, and many are current participants of NALIP/NAMP.</p> <p>Alliant Crime Insurance Program (ACIP) Through a partnership with AIG Alliant has created our ACIP platform offering coverage to member entities on a group purchase basis. Our coverage form incorporates broad insuring agreements including Faithful Performance. We continue to seek new ways to improve coverage and ensure premiums are the most competitive in the industry.</p> <p>Cyber Liability Platform Alliant has a robust Cyber Liability platform that is governed by our San Francisco (CA), office. This team is made up of both brokers and staff whose main purpose is to stay abreast of emerging risks and trends as it pertains to Privacy and Security, as well as to develop innovative solutions to mitigate such risks. Alliant's Cyber team has developed three distinct programs, including APIP Cyber, the APIP Cyber Enhancement Offering (CEO) as well as the Alliant Cyber Excess Solutions (ACES), which have all been utilized by several of our clients who have network security and privacy exposure.</p> <p>Active Assailant Coverage "Active Assailant" situations are unpredictable, develop quickly, and leave devastating personal and fiscal impact on those involved. Specific insurance products exist for this risk; however, they normally require completion of detailed applications, can be expensive, and/or carry high deductibles. For this reason, in conjunction with the Beazley Syndicate at Lloyd's of London, Alliant is offering an "Active Assailant" coverage. We recognize coverage for some events may already be provided by standard property and liability insurance programs, and as such, this coverage is designed to be primary to these programs and can serve as a buffer to your deductible or retention. Coverage is provided for bodily injury or property damage, including defense costs, which the Insured becomes legally liable to pay. Coverage is also afforded for 1st Party Property Damage/Business Interruption, Crisis Management, Funeral Expenses and Counselling Services. This cover is not intended to replace any other coverage that your organization may already have.</p> <p>Other Alliant Programs In addition to Alliant's larger flagship proprietary programs, we employ the same "group purchase" approach to smaller risk exposure to create programs designed specifically to efficiently reduce the overall cost of risks (COR) for our clients. These programs include: CLIP – Catastrophic Liability Insurance Program FLIP-Fiduciary Liability Insurance Policy Environmental Liability Program Special Events Liability Program Fine Arts Program VIP-Volunteers Insurance Program Vendors/Contractors Program and Vendors Professional Liability Program</p> <p>While our proprietary insurance programs are unique and available to our clients only, meeting our clients' needs "where they are" is the most important aspect of what we do. Many of our large public entity clients are not interested in "programs," so a substantial number of policies are placed on a "stand alone" basis. Further, the mere consideration and the recognition of their availability to the client by the worldwide market tends to drive down the commercial market price while enhancing coverage terms and conditions.</p>
51	Describe how you stay current with ethics and public sector procurement requirements.	<p>We regularly attend workshops and seminars to learn about the latest developments in the public entity procurement requirements. Our staff also maintains professional memberships and networks, which allows us to stay informed of emerging trends in the procurement landscape and legislative changes. We also closely monitor relevant public sector conferences, such as ACHRO, SALGBA, CALPELRA, NaCO, and NLC.</p> <p>Additionally, our staff is committed to continuous education and training covering many topics including ethics.</p> <p>Our Compliance experts monitor agency regulatory agendas, industry messaging systems (such as the Employee Benefits Institute of America, Benefits Link, and Health Affairs), and participate in industry advocacy groups (such as The National Business Group on Health and American Benefits Council). We use this information to keep clients up-to-date and act in real-time.</p>
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	<p>We are experts in developing communication strategies that are designed to explain benefit options, available resources, increase employee awareness/participation, and educate employees and retirees on how to get the most out of their benefits all while creating alignment with Sourcewell and adhering to your style guide.</p> <p>Through meaningful, customizable, and curated communications, Alliant helps you engage your employees year-round, leading to smarter healthcare decisions and better benefits</p>

materials that you have distributed to other clients.

experiences.

- CampaignBuilder™ is our turnkey system of communications and content that provides clear and direct benefits materials, reflective of your brand and culture. From open enrollment to compliance requirements, our attractive and engaging turnkey templates relieve your budget and internal resources from having to build core benefits materials. With a full complement of digitally enabled resources, including announcements, benefit booklets/guides, presentations, compliance notices, and more, our flexible and modular nature enables you to layer on additional services and support, too. Materials can be customized with your logo, theme images, colors and taglines.

We also collaborate with many clients who have extremely specific branding guidelines and needs or limited resources on their team. For these clients, templated materials may not be the best fit. Our Communications team is ready to assist with fully custom materials at an additional cost.

Below please find a description of the materials we offer and whether they are included in our proposed fee or for an additional cost.

CampaignBuilder Templates/Materials - Included with fee along with 3 rounds of edits.

- Core Templates
- Benefit Summary Booklets/Guides
- Email Campaigns
- Presentations

- Supplemental Templates
- Postcards
- Posters/Flyers
- Benefits-at-a-glance
- Open Enrollment Kick-Off Video
- Educational Articles, Guides, Emails
- Medical Plan Comparison Chart
- Newsletter Template

- Compliance Templates
- Annual Notices

Notes:

Many templates are available in English and Spanish.

CampaignBuilder Value Adds - Included with fee with 3 rounds of edits.

- FlippingBook including bookshelves (description below)
- Brainshark (description below)
- Licensed Videos (description below)
- Stock Photo Library

Custom Materials – fees may apply

Outsourced materials (printing, professional voiceover, translations, texting campaign, decision support tool, digital postcards, custom videos, etc.)

Fully custom materials

Outsourced materials (printing, professional voiceover, translations, texting campaign, decision support tool, digital postcards, custom videos, etc.)

Fully custom (creation of materials that do not currently exist)

Social Media Campaign

Total Comp Statements

Below are further descriptions of Alliant's CampaignBuilder value adds:

- FlippingBook. FlippingBook is another platform that has been highly effective in communicating and educating employees digitally. They allow us to convert PDFs and the open enrollment and new hire benefit overview booklets online. We refer to these digitized documents as "flipbooks." The straightforward design and standard text can be customized for various employee groups/locations. In addition, FlippingBook includes a Bookshelf feature which allows us to house several individual flipbooks via one link. This makes it much simpler to communicate documents to employees (one link versus multiple links) and is a great solution for clients who do not have a robust BenAdmin library or intranet/portal for housing documents.

- Brainshark. Our recorded presentations have been the most effective part of digital communications for our clients as they reduce the administrative burden from HR teams, who must conduct new hire benefit presentations regularly. The Alliant team will prepare an engaging open enrollment presentation summarizing the benefit changes for the coming year and highlighting benefit focus points. The presentations can be loaded onto the Brainshark platform which enables either your Alliant team, your staff, or a professional voiceover artist

		<p>to bring your presentation to life and allows viewers to navigate through slides using an interactive table of contents. Employees can access the presentation from any computer or mobile device at a time that is convenient to them. We can also require employees to view the presentation in its entirety and ask them to provide their name when they view the presentation as a confirmation.</p> <ul style="list-style-type: none"> Licensed Videos. Capture employee's attentions with less than 2-minute educational videos on several benefits topics including "Flexible Spending Accounts," "ER vs Urgent Care," "Balance Billing" and much more. Most videos are available in both English and Spanish. Below is a sampling of our video library. Please click the image below or visit the following link for a sample video: https://vimeo.com/609859696/de011cdd18 <p>Note: Many of our digital systems, including Brainshark, FlippingBook, and the video postcards, have utilization reporting capabilities that assist in measuring engagement. We can collaborate with Sourcewell to set up a reporting frequency that best fits your needs</p>
53	<p>What resources do you provide to help your clients remain compliant?</p>	<p>Alliant has an unrivaled in-house Compliance Department to support benefits compliance needs, working both independently and as an integral part of Alliant's dedicated account team for Sourcewell. The practice is staffed by experienced attorneys and benefits professionals who exclusively review, research, and help problem-solve the employee benefits compliance needs of our clients. We monitor compliance regulations at the federal, state, and local levels.</p> <p>We remain current with all federal regulatory agencies, including the Internal Revenue Service (IRS), the Department of Labor (DOL), the Department of Health and Human Services (HHS), and the Centers for Medicare and Medicaid Services (CMS).</p> <p>Specific compliance tools, resources, and functions Alliant will provide to Sourcewell include, but are not limited to, the following:</p> <ul style="list-style-type: none"> Conducting an initial compliance review of your firm within 90-days of our appointment as your consultant/broker. (Alliant will also help Sourcewell redress any compliance issues uncovered by our review.) Subsequently conducting an annual compliance readiness audit for Sourcewell Maintaining and updating all plan documents to ensure they are accurate, ERISA compliant, properly executed, and support Sourcewell's legal obligations as Plan Sponsor Providing access to the contents of Alliant's online compliance library of news and research, which we continually update on a topic-by-topic basis Providing a series of Compliance Toolkits. Each toolkit gives Sourcewell consolidated guidance, action plans, and forms/templates to fulfill the complex requirements for "major" (and ongoing) compliance subjects such as Healthcare Reform and HIPAA. Identifying all required ACA filings and, if necessary, assist Sourcewell with their completion Providing all required employer/employee compliance notifications (including updates) as required by law for Sourcewell to distribute Having a compliance attorney/consultant on your Alliant account team, who is available to answer questions and provide general guidance on regulatory concerns specific to Sourcewell Continually researching and communicating changes in compliance regulations through our National Compliance Department
54	<p>What types of materials can you provide to communicate pertinent information to client's employees?</p>	<p>We provide a comprehensive range of materials to communicate pertinent information to client's employees, including but not limited to:</p> <ul style="list-style-type: none"> Benefits Summary: Customizable brochures that can be distributed as PDFs, posted online, and/or printed and distributed. Open Enrollment Email Announcements: Series of emails leading up to open enrollment, communicating benefit changes, employee action steps, and meeting schedules. Postcards: Announcements ahead of open enrollment, professionally printed and mailed to employees' homes. Posters: Worksite posters to remind employees about open enrollment dates and action steps. Open Enrollment Presentations: Engaging presentations summarizing benefit changes for the coming year, available in-person, online, or pre-recorded. Educational Videos: Videos on numerous benefits topics to help employees and dependents understand their benefits. MyBenefits.Life: A proprietary mobile application and web portal providing 24/7 access to benefits information, provider details, and more. Wellness Program Announcements: Newsletters and reminders about wellness programs, flu shots, preventive care, etc. QR Codes: Quick response codes for easy access to important benefits content. Face-to-Face Meetings: On-site education and support for employees. Additional materials such as compliance notices, benefit guides, enrollment booklets, and more. <p>For samples of our communication materials, please visit: https://alliantbenefits.cld.bz/Alliant-Sample-Communications</p>

55	Do you have any internet-based employee communication tools?	<p>Yes, we provide MyBenefits.Life, a mobile application (iOS and Android) and web portal (tablet enabled) that gives employees and their dependents 24/7 access to all their benefits information. The application is customizable and can include your logos and colors. MyBenefits.Life makes communicating benefits and related HR information easy to distribute to employees and their families. MyBenefits.Life provides immediate access to:</p> <ul style="list-style-type: none"> • Information on current benefit offerings • Plan details, plan summaries, documents • Provider contacts and web links • HR announcements and enrollment information • Open enrollment and tips for new hires • Educational tools to promote health literacy (informative videos, articles, and glossary)
56	What safety training assistance does your firm provide?	<p>Alliant provides a comprehensive range of safety training assistance through various resources and programs. Our offerings include:</p> <ul style="list-style-type: none"> • Web-based safety training webinars with a property focus, available monthly and free of charge. Topics include incident investigation, managing electrical hazards, flood and water damage prevention, and more. • Access to the Alliant Risk Management Center (RMC), an online portal with tailored risk control solutions. The RMC includes customizable training presentations, regulatory analysis, daily regulatory updates, best practices, and reference material. • Training resources such as PowerPoint presentations, checklists, meeting agendas, quizzes, and handouts. • Daily news briefs and feature articles written by safety professionals. • A comprehensive SDS database for safety data sheets. • Custom employee newsletters, safety plans, and engaging training activities. • Incident Manager tool for recording, tracking, and reporting workplace injuries and incidents. • Safety Video On-Line Streaming • Alliant Risk Management Center • Safety Fact Sheet and Template Database • Risk Control Newsletter
57	How does your firm ensure compliance with regulatory requirements?	<p>Alliant ensures compliance with regulatory requirements through our in-house National Employee Benefits Compliance department, staffed by experienced attorneys and benefits professionals. We monitor federal, state, and local regulations and provide proactive, client-tailored compliance support. Our services include compliance reviews, annual audits, plan document maintenance, and access to online compliance resources. We also offer toolkits, ACA filing assistance, compliance notifications, and expert guidance. Our team stays updated on regulatory changes and provides ongoing support to address client concerns.</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
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>Under our property and casualty products, annual premium payments are standard. We can, however, offer premium financing to our clients when requested. Payment methods can be with checks or wires.</p> <p>For benefits, we can accept payment through commissions included in the various products or as a fee billed directly to the client or a combination of the two. For a fee-based client, our billing process involves collaborating with the client to determine the frequency of invoicing, which can be monthly, quarterly, or as agreed upon. Once an agreed-upon fee and statement of work are established, we will send an invoice to our client with the agreed upon amount. Each invoice includes detailed backup data required for reconciliation, ensuring transparency and accuracy. Payments are typically made via check, however, other arrangements such as ACH can be made. Additionally, our in-house Billing Team can allocate premiums by department or other subgroups, resolve discrepancies, and bill one consolidated statement.</p>

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.	<p>We have attached samples of our Broker of Record Letter and Customer Service Agreement under separate cover in the document section of the bid platform. These templates provide a clear framework for collaboration and ensure transparency in our engagements with participating entities.</p> <p>For Employee Benefits and Property and Casualty, we propose to use the following standard transaction documents in connection with any awarded agreement:</p> <ul style="list-style-type: none"> • Broker of Record Letter – This document outlines the designation of our organization as the broker of record for the participating entity. It includes key terms and provisions to formalize this relationship and allows us to work with the insurance carriers on behalf of the participating entity. • Customer Service Agreement – This agreement defines the scope of services, terms, and conditions for the provision of our services, including compensation and mutual obligations. 	*
69	Describe your billing process.	<p>We can accept payment through commissions included in the various products or as a fee billed directly to the client or a combination of the two. For a fee-based client, our billing process involves collaborating with the client to determine the frequency of invoicing, which can be quarterly, monthly, or as agreed upon. Once an agreed-upon fee and statement of work are established, will send an invoice to our client with the agreed upon amount. Each invoice includes detailed backup data required for reconciliation, ensuring transparency and accuracy. Payments are typically made via check, other arrangements such as ACH can be made. Additionally, our in-house Billing Team can allocate premiums by department or other subgroups, reconcile premiums billed against current eligibility, resolve discrepancies, and bill one consolidated statement.</p>	*
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.	<p>For benefits, if the client wishes to have commissions built into their products, we can accommodate that request. We can also accommodate a fee which will be invoiced directly the client. Our retail fee will be discounted for Sourcewell participants.</p>	*
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.	<p>For benefits, the pricing discount will be 5-10% off standard retail pricing (depending on size of group and scope of services) .</p>	*
72	Describe any quantity or volume discounts or rebate programs that you offer.	<p>Employee Benefits: Alliant offers a variety of discount programs. If a client elects to work with Alliant for both benefits and risk management, we will offer a volume discount off standard retail fees. In addition to Alliant volume discounts, we also offer our clients access to discounts that Alliant has negotiated with providers to offer reduced pricing on their products and services. For example, Alliant is the program manager for the Sourcewell ancillary program where there are typically 10-15% discounts off current Life/Disability rates. Additionally, we maintain relationships with payroll/HRIS vendors that enable discounts on their proposed services for clients, such as our relationship with ADP, which includes pricing discounts on services. We also offer several purchasing cooperatives that address areas such as stop loss and pharmacy. Furthermore, our pharmacy team leverages group purchasing arrangements like the HealthTrust Purchasing Group, which provides significant savings through strong PBM contracts and pricing agreements, as well as custom programs to address specialty pharmacy costs.</p> <p>Property and Casualty: Alliant has developed numerous insurance programs that provide discounted premiums due to the volume of members within the program. We call this the “Costco Approach” in purchasing insurance. The success of our program(s) is achieved by utilizing the strategy of group purchase. Alliant can leverage the combined size of the participating group to provide below market pricing, and broader coverage than what is available in the standard marketplace. We have included a brief overview of some of the programs that may be of interest to Sourcewell’s participants.</p> <p>Alliant Property Insurance Program (APIP) More than 20 years ago Alliant created our proprietary property program, APIP, as a concept to simultaneously take individual property insurance placements for several public entities in California to the insurance markets. Since then, APIP has grown into the single</p>	

largest property placement in the world, with over \$650 billion in Total Insurable Values representing over 10,000 public entities in 45 states including some of the largest water & sewer districts in the U.S. This program integrates property, boiler & machinery, fine arts, and auto physical damage. APIP's form is among the broadest forms found in the industry and includes coverage for cyber liability (1st and 3rd party coverage), which is not normally offered through other property policies. Each year the program grows, and this growth allows for improved pricing and coverage for our clients.

To further illustrate the broadness of the form, here is a list of APIP's program highlights:

- > \$1 billion all risk limit per occurrence.
- > Improved Wind/Hail deductible options available by County in the State of Colorado.
- > APIP considers Sourcewell to fall under "W/H Zone Tier 2" and could potentially be offered a lower W/H deductible structure than currently available.
- > Coverage not limited to schedule.
- > No coinsurance clause.
- > Earthquake and flood coverage available.
- > Automatic acquisition for newly acquired locations up to \$100 million in value (\$25 million for no additional premium).
- > Course of construction coverage for new and renovation projects up to \$50 million.
- > \$100 million limit for boiler and machinery.
- > Includes coverage sabotage and terrorism.
- > Includes coverage for cyber liability (1st and 3rd party).
- > Includes coverage pollution liability and cleanup (1st and 3rd party).
- > Includes coverage for vehicles and mobile equipment on a replacement cost basis.
- > \$5,000,000 per occurrence for Tax Revenue Interruption even if these specific values have not been reported (if reported higher limits apply). Not all carriers will provide Tax Revenue Interruption coverage, let alone a sub-limit when these values have not been reported.

Public Risk Innovation, Solutions, and Management (PRISM) PRISM is believed to be the largest property & casualty insurance pool in the country. Established in 1979, and historically based in California, it provides a suite of coverage solutions to public entities and pools. On July 1, 2016, PRISM established a captive insurance company, the Excess Insurance Organization (EIO). Alliant is excited to offer EIO's Public Entity Liability (including Law Enforcement Liability) to pools and large self-insured entities nationwide. EIO will consider insuring portfolios in a variety of ways, including quota share, or on a \$5M lead layer or excess layer basis, both insurance and reinsurance. Premiums are non-assessable, and likewise not subject to dividends, and coverage is backed by AM Best "A" rated insurers. No collateralization is required. Benefits include increased purchasing power in leveraging the marketplace to maximize coverage while minimizing cost, additional market capacity, and participant directed insurance provider. Services available include Target Solutions, Webinars and PRISM TV, EPL consulting services, Legal counsel services, Toolbox of risk control best practices, and Contracts with over 30 service providers and pre-negotiated rates.

Alliant National Municipal Liability Program (ANML)

This joint purchase program provides a program limit of \$10 million per occurrence with no aggregate limits except completed operations. The program is competitively priced and has boasted substantial growth each program year. ANML program highlights include:

- > Manuscript excess policy provides coverage for general liability, auto liability, public officials E&O, and employment practices liability within a single policy.
- > Occurrence based public officials, police professional, and employment practices liability (EPL).
- > Flexibility to accommodate low deductibles and high retention attachment points.
- > Broad coverage 'give back' under inverse condemnation exclusion.
- > Carrier will reimburse 50% (up to \$250,000) of defense costs spent if the insured is successful in defending an EPL claim.

National Aircraft Liability and Hull/Airport Liability Insurance

		<p>(NALIP/NAMP) Since 1988, Alliant has been serving the aviation insurance needs of public entities throughout California. Ten years ago, Alliant was expanding of our longstanding CSAC-EIA/PRISM Airport Program by creating the California Airport Liability Insurance Program (CALIP). We have since expanded and rebranded these two programs to offer coverage outside of California and rebranded to: the National Airport Liability Insurance Program (NALIP) and the National Aircraft Municipal (NAMP). The NALIP/NAMP program(s) have allowed us to utilize economies of scale to leverage the aviation marketplace for our clients who are responsible for protecting the aviation risks of their respective cities. Our programs offers broader coverage, for example, sublimits that are much higher than what you can find in the open market. We have over 50 airport clients that benefit from these programs, and many are current participants of NALIP/NAMP.</p> <p>Alliant Crime Insurance Program (ACIP) Through a partnership with AIG Alliant has created our ACIP platform offering coverage to member entities on a group purchase basis. Our coverage form incorporates broad insuring agreements including Faithful Performance. We continue to seek new ways to include coverage and ensure premiums are the most competitive in the industry.</p> <p>Cyber Liability Platform Alliant has a robust Cyber Liability platform that is governed by our San Francisco (CA), office. This team is made up of both brokers and staff whose main purpose is to stay abreast of emerging risks and trends as it pertains to Privacy and Security, as well as to develop innovative solutions to mitigate such risks. Alliant's Cyber team has developed three distinct programs, including APIP Cyber, the APIP Cyber Enhancement Offering (CEO) as well as the Alliant Cyber Excess Solutions (ACES), which have all been utilized by several of our clients who have network security and privacy exposure.</p> <p>Active Assailant Coverage "Active Assailant" situations are unpredictable, develop quickly, and leave devastating personal and fiscal impact on those involved. Specific insurance products exist for this risk; however, they normally require completion of detailed applications, can be expensive, and/or carry high deductibles. For this reason, in conjunction with the Beazley Syndicate at Lloyd's of London, Alliant is offering an "Active Assailant" coverage. We recognize coverage for some events may already be provided by standard property and liability insurance programs, and as such, this coverage is designed to be primary to these programs and can serve as a buffer to your deductible or retention. Coverage is provided for bodily injury or property damage, including defense costs, which the Insured becomes legally liable to pay. Coverage is also afforded for 1st Party Property Damage/Business Interruption, Crisis Management, Funeral Expenses and Counselling Services. This cover is not intended to replace any other coverage that your organization may already have.</p> <p>Other Alliant Programs In addition to Alliant's larger flagship proprietary programs, we employ the same "group purchase" approach to smaller risk exposure to create programs designed specifically to efficiently reduce the overall cost of risks (COR) for our clients. These programs include: > CLIP – Catastrophic Liability Insurance Program > FLIP-Fiduciary Liability Insurance Policy > Environmental Liability Program > Special Events Liability Program > Fine Arts Program > VIP-Volunteers Insurance Program > Vendors/Contractors Program and Vendors Professional Liability Program</p>
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.	In the case where the product or service that the client is seeking is not under an already awarded Sourcewell contract, Alliant will market that product/service in the open marketplace and present the results of the marketing to the client for those specific products or services. *

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.	Any service provided by Alliant, which is outside the normal scope of services, can be offered at a discount to Sourcewell participating entities. For example, if a client had someone in their HR department out on leave of absence and needed short-term HR support, our HR specialty team would be able to issue a discounted quote to provide short-term HR support. The quote would be based on the service needed, length of service and the level (HR Generalist, HR Manager or executive level).	*
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.	Alliant will track all entities who utilize our awarded contract and provide Sourcewell with a spreadsheet providing the entity information along with retail pricing and discounted pricing on an annual basis.	*
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.	<p>For participating entities who utilize our awarded contract, we will measure our performance through a combination of formal and informal methods. Formal methods include:</p> <ul style="list-style-type: none"> • Quarterly Meetings: Our Client Services team will meet with the entity at least quarterly to review plan performance and discuss future initiatives. These meetings provide an opportunity for open discussions to understand the level of satisfaction and gather recommendations for improvement. • Client Surveys: Annually, we engage in client surveys to gauge perceptions and identify opportunities to improve our service offering and ensure the needs of our clients are being met. We share the results of the survey with our clients and address any issues as a team. • Employee Surveys: We create employee surveys to hear directly from your people about the services they are receiving. • Weekly or Bi-Monthly Calls & Task Logs: We often meet with clients by phone on a weekly or bi-monthly basis to ensure all issues and tasks are complete. The issue log provides dates issues are opened, follow-up dates, and dates of completion, serving as a report card on our services and timeliness. • Client Stewardship Report: Alliant provides our clients annually with a stewardship report. This report identifies the work Alliant and our client have done in a year, outlines our success, meetings and issues that were resolved. 	*
77	Does your organization agree to disclose all fees, commissions, and other forms of revenue generated by serving public sector clients?	Yes, we agree to disclose all fees, commissions, and other forms of revenue generated by serving public sector clients. We are committed to full transparency and provide annual commission disclosures by line of coverage. Additionally, we disclose all compensation arrangements, including direct and indirect compensation, contingent commissions, and non-cash compensation. Our philosophy is to ensure that all forms of compensation are fully disclosed to our clients, including those in the public sector.	
78	Does your firm assist public agencies with state specific discount programs?	Yes, for example, state pharmaceutical assistance programs or programs that offer discounts on various everyday purchases.	

<p>79</p>	<p>Provide an example of fee or commission disclosure documents provided to your clients.</p>	<p>Here is a copy of the P&C Disclosure Statement DISCLOSURES Surplus Lines Fees and Taxes. In certain circumstances, placement of insurance services made by Alliant Insurance Services, Inc. ("Alliant") on behalf of a client, with the prior approval of that client, may require the payment of surplus lines assessments, taxes, and/or fees to state regulators, boards, and associations. Such assessments, taxes, and/or fees will be charged to the client and identified separately on invoices covering these placements. The client shall be responsible for all such assessments, taxes, and fees, whether or not separately invoiced. Alliant shall not be responsible for the payment of any such fees, taxes, or assessments, except to the extent such fees, taxes or assessments have already been collected from the client. Third Party Brokers. Alliant may determine from time to time that it is necessary or appropriate to utilize the services of third party brokers (such as surplus lines brokers, underwriting managers, London market brokers, and reinsurance brokers) to assist in marketing the insurance programs of a client. These third party brokers may be affiliates of Alliant (e.g., other companies of Alliant that provide services other than those included within the scope of services covered in this proposal), or may be unrelated third party brokers. Compensation to such third party brokers will not be part of Alliant's fee. Indirect Income. "INDIRECT INCOME" means insurance carrier contingency arrangements. Alliant will accept these compensation incentives from insurers, if any, including contingent commissions, market service agreements (MSA), volume-based commission incentives and rebates on business placed on behalf of a client. Alliant producers who solicit, negotiate, or place insurance products, or services for clients, do not negotiate indirect income agreements with the carriers, nor do they receive any portion of the indirect income paid to Alliant. Nonetheless, the client may opt-out of having its premiums included in the calculation of indirect income by accessing the "opt-out" form from the link on Alliant's website: http://alliantinsurance.com/Legal-Notices/Pages/Disclosure-Policy.aspx. The "opt out" provision applies only to those accounts served directly by Alliant as a retail agent or broker. It does not apply to account placements for which Alliant's role is that of a wholesaler, MGA, or program administrator working with non-Alliant brokers who represent the client. Indirect Income, if any, is determined by insurance carriers, and if the client does not opt-out, it remains the carriers' exclusive decision to include or exclude certain premiums in any calculation. The availability of information regarding the make-up of any indirect income payment is at the carrier's discretion. Alliant Specialty Insurance Services (ASIS). In addition to the compensation that Alliant receives for providing services to a client, its related entity, Alliant Specialty Insurance Services (ASIS) and its underwriting operations, Alliant Underwriting Services (AUS), may receive compensation from Alliant and/or carriers for providing underwriting services. The financial impact of the compensation received by ASIS is a cost included in the premium. Compensation received by ASIS will be disclosed in writing to a client. Alliant and ASIS maintain an arm's length relationship. While Alliant represents a client as an individual entity, ASIS independently administers its program as a whole and not on behalf of any particular member.</p>
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80	<p>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.</p>	<p>Sourcewell will be compensated with an Administration Fee based on numerous factors including product line and carrier. The fee will be either a percentage of premium, a percentage of revenue (up to 2%) or a flat fee per group. These fees are typically paid by the carrier so their internal guidelines and preferences would guide how the payment is made. Each group will be discussed with Sourcewell before a Service Agreement is issued to a client and will typically take effect at the first renewal following BOR. Insurance licensing will not be required, and the fee will not be considered a commission. Regular reporting intervals will provide Sourcewell with client's names and Sourcewell fees.</p>
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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.	n/a

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

Line Item	Question	Response *
82	Provide a detailed description of all the Solutions offered offered in the proposal.	<p>The principal lines of business that we consult on include Employee Benefits, Retirement Consulting, Property & Casualty, Mergers & Acquisitions, Global Consulting, Workers' Compensation, Liability, Surety and Financial Services, Risk Management Consulting, Specialty Insurance Programs, Underwriting & Financial Services, Specialized Business Services, Preferred Vendor Program, Loss Control, Property Appraisal, and Third-Party Administration.</p>
83	Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.	<p>Below you will find an overview of Alliant services. For additional detail, please see the Proposed Scope of Services included in our Pricing document (uploaded under separate cover in the document section of the bid platform).</p> <p>We consult on all Employee Benefits and Property/Casualty lines of coverage. Employee Benefits includes Medical, Basic Life & AD&D, Voluntary Life & AD&D, PPO Dental, HMO Dental, Critical Illness, Cancer Insurance, Accident Insurance, Long-Term Disability, Voluntary Long-Term Disability, Short-Term Disability, Voluntary Short-Term Disability, Vision, and Employee Assistance Programs.</p> <p>Property and Casualty includes Property, Boiler and Machinery, Earthquake, Flood, Wind, General Liability, Public Officials Liability, Directors and Officers Liability, Employment Practices Liability, Auto Liability, Police Legal Liability, Educators Legal, Cyber, Pollution, Workers' Compensation, Fiduciary, Aircraft and Watercraft, Kidnap and Ranson, Accidental Death and Dismemberment, Student Accident Liability, Medical Malpractice Liability, Course of Construction, Deadly Weapons and Owner Controlled Insurance Programs.</p>
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>Web Based Safety Resources – Alliant Risk Management Center</p> <p>The Alliant Risk Management Center (RMC) is a unique web-based software suite of safety and risk management tools designed to empower your organization's risk prevention efforts. Complimentary access and training will be provided to those individuals designated by the member.</p> <p>The RMC allows you to reduce risk and improve workplace safety by creating effective risk mitigation programs. It is easy to access and use and provides a cost-effective risk reduction and safety center for your entire organization. Alliant's Risk Management Center is right for any organization wanting to proactively manage risk exposures to reduce claims, losses, and associated costs.</p> <ul style="list-style-type: none"> • Safety Library—Access a database of document templates and training courses, created to help companies mitigate risk and reduce losses. • Online Training—Deliver employee safety training efficiently and effectively. • Incident Management Tools—Automate safety audits, field inspections, and corrective action reporting while complying with OSHA reporting requirements.

- HR Compliance Solutions—Access HR best-practice templates, training, news alerts, and expert advice.

The RMC provides tools to not only drive your TCOR by reducing frequency and severity, but can also enhance your compliance efforts through the following tracks

COI Track Safety Observation Track

Manage the Certificate of Insurance (COI) process and ensure your business is protected from unexpected liability. Perform and track safety observations and demonstrate job compliance.

Incident Track Job Description Track

Report claims and reduce incidents. Track employee injuries and related time off work, conduct incident analyses, and run OSHA 300 Logs. Build job descriptions that clearly communicate employee responsibilities and job-related health and safety requirements

SDS Track Training Track

Comply with the new Globally Harmonized System. Automate your entire employee training process. Schedule, track, and document training with a database of training titles.

Audit Track Online Risk Management Library

Create audits, surveys, questionnaires, and self-assessments. Access a multitude of bilingual risk management documents and resources.

HR Essentials Loss Control Inspection Services

Achieve HR compliance, enabled through online educational materials, an HR & Benefits library, and access to on-demand experts. Attain certified experts to analyze current workplace conditions and environmental waste disposal programs, conduct on-site training, and assist with the management, tracking, and reporting of compliance issues

BBS Track

Cultivate a safety culture throughout your organization with a Behavior-Based Safety (BBS) Program. Ensure employees are doing their jobs safely

Alliant offers a variety of additional services to cater to each client's unique needs. Highlighted below are several your members would have access.

Risk Management Consulting Capabilities

All clients have their own unique exposures and appetite for risk. As a result, we understand clients will continually search for ways to better protect themselves from loss, ensure exposures, or just evaluate the cost/benefit of using insurance as an alternative risk transfer option.

Alliant Risk Consulting provides risk and safety management services and resources to our public entity clients throughout the United States using a customizable service philosophy. It is our mission to:

Tailor solutions that mitigate risk across property, casualty, fleet, and workers' compensation lines of insurance and create partnerships to deliver sustainable risk improvement solutions.

We have a qualified team of risk and safety management professionals averaging over 20 years of experience in the fire protection, occupational safety, security, fleet, and environmental disciplines.

Tim Leech, our Public Entity lead risk control consultant, will develop a plan and align subject matter experts and resources through a collaborative process with each client's stakeholders to ensure that every client achieves their risk control goals and objectives. The value-added services we offer will be tailored to every client and in some instances may require an additional fee. However, we have developed several no cost loss control resources that clients and utilize to address its risk exposures:

- Online Video Streaming
- Webinars
- Newsletters
- Fact Sheets

The following services are routinely provided loss control services which we have found to be of great benefit to our clients.

- Loss Analysis
- Risk Control Surveys
- Infrared Surveys
- Training
- Customized Webinars
- Fire Prevention and Property Conservation Consultation
- Insurance Requirements in Contracts (IRIC) Training
- Online Claims & Safety Training

		<p>Analytics Modeling Services Related to Risk Exposures Due to the unique composition of each client as well as their catastrophic exposures, Alliant regularly utilizes RMS and AIR CAT modeling extensively in the marketing of our placements and to help determine the appropriate limits, retentions, etc. We believe it is critical that both our clients and our brokers have a firm grasp of the modeling results to design the optimal structure of your insurance program. We utilize the models to help design the best placement structure, recommend appropriate earthquake, windstorm, wildfire, hailstorm, and flood limits, and understand the key metrics that drive the pricing from an underwriting perspective.</p> <p>The Alliant team will perform CAT modeling on behalf of Our clients. Our process not only uses both RMS and AIR, but we include our special engineering and marketing analytics in addition to modeling expertise to maximize results on large property placements. Our process is designed to meet the risk management needs of diverse clients with large property schedules, risk profiles characterized by exposure to catastrophic risk and clients with incomplete or non-validated modeling data.</p> <p>We provide important client deliverables, including:</p> <ul style="list-style-type: none"> • Professionally developed modeling information to maximize modeling accuracy and reduce modeling error or uncertainty. • Demonstrated results in utilizing this methodology to provide underwriters with accurate documentation as respects primary and secondary construction characteristics, structural details, location specific analysis and analysis of special conditions that impact specific properties. • Demonstrated results utilizing this methodology to reduce premium costs. • Certified engineering expertise deployed through a select group of senior property brokers who developed our modeling process.
85	<p>What customer service standards can public agencies expect from your organization?</p>	<p>Public agencies can expect the following customer service standards from our organization:</p> <ul style="list-style-type: none"> • Quality Control: All deliverables are reviewed for accuracy and completeness by either the Relationship Manager/Lead Consultant or Account Executive before release to a client. Additionally, deliverables from Subject Matter Experts are checked by their respective national consulting departments. • Response Times: Typical response times to non-emergency requests are less than one business day, with emergency requests generally responded to within 90 minutes, often much faster. • Service Metrics: Our clients report less than 0.05% occurrence of errors or dissatisfaction with our service deliverables. Nearly 100% of service issues are resolved to the client's satisfaction within 30 days of initial notification. • Performance Guarantees: We are open to developing customized service metrics and performance guarantees with clients. We typically recommend developing mutually agreed performance criteria, organized into a scorecard model, with compensation forfeiture if pre-determined passing scores are not met. • Annual Stewardship Meeting: We schedule a global performance review at our annual Stewardship Meeting and proactively solicit feedback on our performance at every client meeting throughout the plan year. • Client Satisfaction Survey: An annual client satisfaction survey is released to ensure client needs are being met.

86	What reports do you provide your Public Entities and with what frequency?	<p>We provide a comprehensive range of reports to our public entity clients, tailored to their specific needs. The standard reports and their frequencies include:</p> <ul style="list-style-type: none"> • Claims experience (monthly for self-insured plans) • Rate calculations (annual) • Employee contribution modeling (annual) • Plan cost/budget projections (annual) • Recalculation of carrier renewals to confirm technical accuracy and underlying assumptions (annual) • COBRA premium calculations (annual) • Actuarial modeling (annual) • Pre-renewal projections and re-calculation of vendor renewal proposals (annual) • IBNR (Incurred but not reported) reserve calculations for self-funded plans (annual) • Stop loss level analysis for self-funded plans (annual) • Pharmacy benefits analysis (annual) • Migration analysis (as needed) • Benchmarking (annual or as needed) • Custom reporting and special projects (as requested by the client) • Select Data Analytics reports (on a scheduled basis per report type) <p>Additionally, we provide:</p> <ul style="list-style-type: none"> • Cost tracking (recommended monthly) • Plan performance dashboard (recommended quarterly) • IBNR calculation (recommended quarterly) • Reforecast of current year costs (recommended quarterly, and possibly monthly during Q4) • Benefit plan budget (as required by the client) • Rate template (annually, immediately following completion of final pricing for the next year) • Various administrative reports—project plan, year-end shared accomplishments summary, open issues logs, etc.—projected regularly, and ad hoc as appropriate.
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87	<p>What inspection or other consulting services to you offer internally or by a 3rd party?</p>	<p>In addition to the Risk Management and Loss Control services provided in our earlier responses we also provide the following services through our property programs. Boiler Inspections Appraisals Infrared Testing</p> <p>Within our Cyber Consulting services, we include:</p> <ul style="list-style-type: none"> - Cyber Risk Assessment - Incident Response Readiness - Strategy, Governance and Compliance - Security Architecture and Controls - Data Protection and Governance <p>Cyber Consulting is just one of the core capabilities of the broader Alliant Cyber practice. As illustrated below, Alliant is a truly holistic and integrated Cyber Risk Management services firm.</p> <p>Optional consulting services are available to members and are summarized in the following table. The items listed as included are services provided to our clients.</p> <table border="1"> <thead> <tr> <th>SERVICE</th> <th>FREQUENCY/COMMENTS</th> <th>COST</th> </tr> </thead> <tbody> <tr> <td>Loss Control Site Visits</td> <td>As requested,</td> <td>\$165-\$225/hr.</td> </tr> <tr> <td>Infrared Surveys</td> <td>As requested,</td> <td>Included</td> </tr> <tr> <td>Enterprise Risk Management/ Business Continuity Plan</td> <td>Associates and Senior Associates</td> <td></td> </tr> <tr> <td>Associate Director and Director</td> <td></td> <td></td> </tr> <tr> <td>Senior Director, MD, SMD</td> <td>\$175-\$300/hour</td> <td></td> </tr> <tr> <td></td> <td></td> <td>\$325-\$450/hour</td> </tr> <tr> <td></td> <td></td> <td>\$450+/hour</td> </tr> <tr> <td>Fire Plan Review</td> <td>As needed</td> <td>Included</td> </tr> <tr> <td>Hot Work Permit Program</td> <td>Upon Request</td> <td>Included</td> </tr> <tr> <td>Fire Impairment Notification and Tags</td> <td>Upon Request</td> <td>Included</td> </tr> <tr> <td>Safety Video On-Line Streaming</td> <td>Upon Request</td> <td>Included</td> </tr> <tr> <td>Preliminary Risk Management Assessment</td> <td>Upon Request</td> <td>Included</td> </tr> <tr> <td>Alliant Risk Management Center</td> <td>Upon Request</td> <td>Included</td> </tr> <tr> <td>Pre-Construction Fire Planning</td> <td>As needed</td> <td>\$150-\$250/hour</td> </tr> <tr> <td>Continuity Planning</td> <td>Upon request</td> <td>\$250-\$300/hour</td> </tr> <tr> <td>On Site Custom Training</td> <td>Upon request</td> <td>\$175-\$250/hour</td> </tr> <tr> <td>Industrial Hygiene Services</td> <td>Upon Request</td> <td>\$175-\$250/hour</td> </tr> <tr> <td>Live Webinar Training</td> <td>10 Property Webinars Annually. 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Live Webinar Training	10 Property Webinars Annually. Archived webinars for unlimited playback. July 2020-June 2021	Sessions Include:																																																																																																			
	Pandemic – Caught off Guard																																																																																																				
	Fundamentals of Emergency Management																																																																																																				
	Counteracting Violence in the Workplace																																																																																																				
	Property Vulnerabilities																																																																																																				
	Hazardous Materials Storage																																																																																																				
	Fire and Life Safety Assessments and Audits																																																																																																				
	Kitchen Hazards and Fire Suppression Systems																																																																																																				
	Introduction to Safety Management																																																																																																				
	Observational Safety and It is Value																																																																																																				
	Effective Communication	Included																																																																																																			
	Safety Fact Sheet and Template Database	Access to hundreds of documents, power points and templates on a variety of property and safety topics. Included																																																																																																			
	Risk Control Newsletter	Quarterly Newsletter: Topics range from accident forensics, benefits of infrared surveys, roof inspections, crime prevention, OSHA, claims and many others. Included																																																																																																			
	COVID-19 Exposure Screening	Monthly Subscription \$100 per organization + \$1 per employee																																																																																																			
	Travel (Loss Control specific)	Based upon project location Actual Expense																																																																																																			
88	<p>What educational programs or services do you offer specifically for Public Sector?</p>	<p>Alliant offers a series of educational webinars and roundtable forums to our public entity clients and prospects. Sourcewell participating entities can attend at no cost. These webinars and roundtables focus on topics relevant to the entities and provide educational and training opportunities. We can also use this platform to remind public entities of the Sourcewell awards and their value proposition.</p>																																																																																																			

89	How do you stay current with Public Entities needs?	<p>Alliant is one of the largest public entity brokerage firms and we consistently gain experience from working with many public entities throughout the country. Our extensive public entity client list keeps us proactively focused on solving issues that are unique to public entities.</p> <p>Alliant understands the political nature of the collectively bargained benefit process. Often major program decisions cannot be made without the consensus of a public entity's constituent groups and/or insurance committee. We have over 40 years of experience working with public agency Benefits Committees to educate, inform, empower, and gain consensus with their constituents to make collective decisions that ensure the future success of their respective Health and Welfare Program.</p> <p>Our staff also maintains professional memberships with many public entity associations and governmental risk pools. We regularly attend the public entity focused conferences and symposiums which allows us to stay informed and current with Public Entities' needs.</p>
90	What is your process to identify and correct any challenges Public Entities have with your agency or staff?	<p>Our process to identify and correct any challenges public entities have with our agency or staff involves several steps. First, we ensure that our dedicated account team is available on demand to address any issues that arise. These issues typically fall into categories such as carrier/vendor service or contract related, enrollment related, claims related, benefits technology related, and compliance related. The primary points of contact for assistance are the Account Executive and Account Manager. They will address the issue through research, coordinating with the appropriate subject matter experts and/or Alliant executive management, and working with the HR department to achieve resolution. Additionally, we may engage other resources, such as carrier/vendor management, industry information sources, or our firm's affiliates or business partners to ensure a positive resolution.</p>

<p>91</p>	<p>Describe the various claims management services, protocols that your organization would make available for public agencies.</p>	<p>Employee Benefits Alliant has implemented protocols specifically designed to address the unique needs of public agencies. Employee Benefits services are delivered through a dedicated Alliant Service Team, working in close collaboration with the specialized Alliant Programs Team to ensure seamless support and effective issue resolution. Our claims management services include:</p> <ol style="list-style-type: none"> 1. Claims Resolution Support: We assist in resolving complex claims issues, acting as an advocate between the agency, employees, and carriers to ensure accurate and timely settlements. 2. Claims Reporting and Analysis: In collaboration with the carrier provided data, our team manages the detailed reporting and trend analysis, enabling public agencies to understand their claims activity, identify patterns, and implement strategies to mitigate future claims costs. 3. Carrier Liaison Services: We work directly with carriers to address service issues, claims discrepancies, or escalated matters, ensuring agencies receive responsive and equitable resolutions. <p>Property & Casualty Alliant Claims Consulting Capabilities Alliant fully understands that the true value of any insurance contract can only be determined by its response to loss. Our considerable experience working with public entities, has allowed us to develop a highly effective in-house claims department staffed by the most talented personnel in the industry who specialize in large, complex claims. Our claims consultants average over 35 years of experience and operates as a national team which affords borderless resources to our clients. Our team understands the process involved with large claims and will develop effective strategies to ultimately drive positive outcomes and recoveries in critical situations. Our lead claims advocate Robert Frey has the expertise and knowledge necessary to help manage client's claim submittals.</p> <p>Our claims team's most valuable role will be to function as your claim consultant and advocate on difficult and severe claims to achieve prompt and equitable claims settlements. Their goal will also be to complement and supplement your efforts in obtaining favorable claims resolutions while acting as our client's claims resource. As part of our comprehensive claims handling services, we will:</p> <p>Establish, in conjunction with client and the carrier/TPA, special claim handling instructions that include notification procedures of claim adjustments and settlements at a specified dollar amount.</p> <ul style="list-style-type: none"> • Provide oversight of the adjustment and settlement of claims by the carrier/TPA. • Present analysis of insurance coverage and advise the client on coverage application to specific claims. Advocate on behalf of the client in connection with all claims particularly those that involve disputed coverage issues. • Assist in coordinating, monitoring, reviewing, and evaluating the claims services provided by insurers. • Scrutinize carrier loss runs to ensure accuracy. • Coordinate carrier/ claim reviews, distribute loss data, and discuss outstanding claim issues with the client and the carrier. • Marshall all documents necessary for effective tenders of defense, where applicable. • Recommend legal counsel where appropriate after consultation with the client. • Advise the client continually on the progress of contested or questionable claims. <p>Your broker team will also serve in a claims capacity and can advise on day-to-day activities such as claims reporting and policy coverages.</p> <p>Expedited claims resolution is always important and even more-so in today's current hard insurance marketplace, an industry dependent on cash flow, claims payments or securing partial payments is key through advocacy resources. Our designated team will guide you through the claims process and will provide you with the best possible service. We understand your business and will manage all your needs, from triaging all your claims to finalizing a settlement and everything in between. We offer:</p> <ul style="list-style-type: none"> • 24/7 claims support and advocacy. • Dedicated claims specialist and team. • Continuous monitoring. • Property claims oversight.
<p>92</p>	<p>Describe any technology made available to public sector clients.</p>	<p>Technology Resource Platforms Alliant's commitment to technology in our business practices is significant and demonstrated through our recent designation as an InformationWeek Elite 100 winner. This prestigious designation recognizes the most innovative users of business technology in the United States. We offer tools empowering our clients to make sound business decisions that propel their organizations forward. While there are many Alliant technological capabilities we could highlight, we will focus on a few systems we believe are most relevant to our public entity clients. These systems significantly aide in the management and organization of documents, reports, information, and communication during the contract, at renewal, and beyond:</p>

AlliantConnect

AlliantConnect is a secure, easy-to-use portal that enables you to easily access and manage your insurance information from any Internet connection at any time. Your customized portal provides you with a transparent view into your insurance business through easy management and access to all insurance related documents: policies, binders, invoices, proposals, and certificate issuance, etc. In addition, important dates, deadlines, and announcements are also available through the portal, along with direct access to your service team. All client data is secured to the appropriate account teams, and the database itself and all backups are stored in an encrypted format. In addition, all document changes are archived for audit history.

AlliantConnect Property Schedules

Maintaining accurate and detailed information for buildings, and other insurable property, is the single most important thing you can do to enhance your stature in a property underwriter's mind. This is especially true in a hardening insurance market where data credibility is invaluable. Our property schedule database program, OASYS-Net, helps our clients maintain good underwriting data. Features include tracking Construction, Occupancy, Protection Exposure, Geo-codes, Values, Square footage, and other critical location details. Reporting capabilities include export to both Excel and PDF.

Archipelago—The Smarter SOV

Alliant has partnered with Archipelago to provide an online risk data platform that will empower the clients and your broker team to drastically improve the SOV data quality. By replacing labor intensive manual spreadsheets, this platform makes managing property data easier, more efficient, and more useful.

Once Alliant receives a client's updated SOV, we will upload this into Archipelago's platform where it will be formatted into model-ready files, and worked through by the Archipelago team to correct, fill, and verify the client's COPE and exposure data. By transposing the current SOV into this format, we are not only ensuring a smooth and quick process for modeling and analyzing the client's portfolio, but your submission will stand out from others and gain immediate underwriter attention once the marketing efforts begin.

Readiness Report—Once the upload to Archipelago has been completed and all information on the SOV and other various documentation, such as appraisals, engineering reports, and structural drawings, have been compiled into a single document, Archipelago will create a Readiness Report to outline how the client's SOV compares to their peers as well as areas that can be addressed to improve the overall SOV quality. All the information highlighted within the Readiness Report will have a direct correlation to accurate modeling results.

Alliant and Archipelago will collaborate with the client's staff to ensure the team has a complete understanding of all the platform's capabilities, such as various groupings (by city, construction, occupancy, and exposure to name a few), YOY analysis and tracking, and much more.

Data Enrichment—At the conclusion of the initial upload and analysis performed by Archipelago and Alliant, those top locations on the client's SOV that need to be enriched (i.e., are of significant value and have various COPE components either missing or unclear) are outlined for the client to address.

By providing the missing information or enhancing the data quality of this information with more precise detail, the client, Alliant and Archipelago can ensure the modeling information run by both Alliant and the insurance markets is as accurate as possible. This in turn eliminates the need for default assumptions which have a negative impact on the client's portfolio and overall insurance pricing.

Benefits of Archipelago

Data Quality Toolkit – Analyze client portfolio data for completeness, see reports on data weakness and enrich the portfolio data using machine learning and additional documents like PCSs, loss control reports, appraisals, and engineering reports.

Marketing and Placement – Securely share and present the client's submissions to insurers in a visual manner and track their interaction with data.

System of Record for Property Portfolios – Identify and associate buildings and changes over time and across portfolios and ensure baseline quality levels including address resolution and hazard determination.

Gain Efficiency in Catastrophe Risk Modeling – Archipelago formats and standardizes property risk data into files that can be easily used in catastrophe modeling software, including RMS and AIR, saving valuable time and resources previously required to prepare data for modeling.

On-demand model exports from within the Archipelago platform.

Files include an expanded data properties specific to RMS and AIR catastrophe models.

Embedded logic to optimize primary and secondary modifiers for modeling.

Additional information on the Archipelago and a demonstration of its capabilities is available on request.

Certificate Handling

CSR 24 Certificate Management System

We utilize CSR 24 to provide 24-7 access to certificate requests and history. This is a user-friendly product that can allow multiple client users from the same organization to request and manage certificates. CSR 24 is available free of charge to all our clients.

The maximum turnaround time for issuing certificates is 24 hours. Our web enabled product allows flexibility in responding to customer needs.

Track Vendor Certificates:

Set up and maintain your own list of certificates provided to your vendors.

Sort your list by agency, line of coverage, provider name, expiration date, etc.

Request Certificates of Insurance:

You no longer need to fax or call to request a certificate of insurance for property coverage.

Complete and submit the request to Alliant online.

Certificates can be emailed in a secure PDF format to the certificate holder.

Reports & Exports:

Vendor Certificate Tracking – easily creates a list of overdue, upcoming or all certificates as a formatted report to Excel export. Formats for mailing labels are also available.

Incoming certificates will be reviewed within one business day to ensure:

Compliance with contractual indemnification requirements.

Compliance with coverages/limits.

Compliance with special working/additional insured requirements.

Compliance with AM Best/carrier rating requirements

93. Describe your account services department.

Our Comprehensive Account Management Model

EXPERT TEAM AND CUSTOMIZED SERVICES FOR OPTIMAL CLIENT SATISFACTION

Alliant has decades of experience creating the “right” account team for literally thousands of clients. However; as impressive as their individual credentials; the whole is more than the sum of its parts. One of Alliant’s distinctions as broker/consultant is how we coordinate and customize our personnel resources to optimize their effectiveness.

Our Benefits account management model includes the following key personnel:

- Account Executive/Benefits Team Leader: Responsible for overall client satisfaction and direct management of the account team.
- Account Manager: Primary day-to-day contact for plan administration related issues, vendor management, and project management lead.
- Strategic Consultant: Oversees execution of deliverables and provides benefits and compliance/legislative expertise.
- Financial Lead/Actuary: Updates financial analyses, manages marketing, and renewal process.
- Subject Matter Experts (SMEs): The SMEs assigned to your team represent all the specialized disciplines needed to help implement Sourcewell’s program (e.g.; Compliance; Pharmacy based on your RFP and Scope of Services). The SMEs are supported by their national practices, but report to and are managed by your Account Executive/Benefits Team Leader for Sourcewell.
- Executive Leadership: Alliant’s Executive Sponsor and Relationship Manager provide oversight; issue escalation; and assignment of additional firm resources if needed.

Together; they direct all strategic, management, and financial functions for your account.

Your Account Executive/Benefits Team Leader assisted by the Account Manager also serve as points-of-contact for your executive management and HR/Benefits department; both on a day-to-day and as-needed basis.

All account team members (who average 20+ years of industry experience) are assigned with the goal of having a long-term, ongoing relationship with Sourcewell.

This includes our SMEs who, regardless of their department, report to more than one

		<p>Benefits Team Leader on a case-by-case basis. No SME is tied to a specific territory or line of business. As a result, Alliant can leverage our intellectual capital to the best advantage of every individual client—but without having to impose time limits, territorial restrictions, or chargeback costs.</p> <p>Property and Casualty Team: The Alliant ONE P&L structure allows us to serve our clients in a manner that is unmatched by any other broker. We are ONE team. There are no silos by product or separate departments for broking and placement. Alliant's ONE team structure, which is a cornerstone of our culture, mandates that we bring the best brokerage talent to the client to manage specific, complex assignments. Being privately owned means that we answer to our clients—not stock analysts or stockholders.</p> <p>Our core mission is to provide our clients superior expertise, teamwork, innovation, and market leading insurance solutions. Our industry specialist are leading authorities in modeling, analytics, risk transfer and mitigation strategies.</p> <p>Though there is value in having local representation, it is our belief there is immeasurable value in having a team of public entity specialists with national experience and a global perspective at one's disposal. Our entrepreneurial approach is what makes Alliant different from all other brokers. We focus exclusively on what we do best—broking and risk management consultation.</p> <p>Our business model eliminates geographic boundaries and regional profit centers. There are no financial restrictions deploying the best expertise for clients. We will collaboratively identify which resources will help drive the best possible results for each of your members. Our goals, as a firm, are reflected in our results which are based upon:</p> <p>A client-first service model. No manufactured corporate/overhead expenses. No geographic conflicts. Industry innovation through proprietary technology products. Flat management structure. Competitive advantage with specialty market expertise. Attraction and retention of high-quality, experienced talent.</p> <p>This approach is underpinned and deeply rooted by executing and being: Attentive: We will treat this engagement with the utmost care; we will provide our services with a commitment to professionalism, trust, and the highest level of personal and professional integrity. Proactive: We are committed to understanding the goals and needs of each of your members and providing our best service, consulting advice and deliverables. We will provide our clients with innovative solutions and opportunities with an eye towards continuous improvement and risk transfer efficiencies. Responsive: We will respond to your member's needs in a timely and professional manner; we will return all voicemail and email communication in accordance with our agreed-upon service standard guidelines; we will deliver and review our work product on a timely and as-agreed basis.</p> <p>These guiding principles have allowed our firm to recognize an industry leading 98% client retention rate. Our Property and Casualty account management model includes the following key personnel:</p> <ul style="list-style-type: none"> • Team Leader: Responsible for overall client satisfaction and direct management of the account team. • Account Manager: Primary day-to-day contact for gathering and analyzing exposure data, program design, service deliverables and project management lead. • Account Administration: Provide day-to-day quality administrative services, including such items as certificate processing, endorsement requests, policy review, policy summaries and invoicing. • Subject Matter Experts (SMEs): The SMEs assigned to your team represent all the specialized disciplines needed to help implement your member's program. The SMEs are supported by their national practices, but report to and are managed by the Team Leader for your members. • Executive Leadership: Alliant's Executive Sponsor and Relationship Manager provide oversight; issue escalation; and assignment of additional firm resources if needed.
93	Describe your account services department.	<p>Our Comprehensive Account Management Model EXPERT TEAM AND CUSTOMIZED SERVICES FOR OPTIMAL CLIENT SATISFACTION</p> <p>Alliant has decades of experience creating the "right" account team for literally thousands of clients. However; as impressive as their individual credentials; the whole is more than the sum of its parts. One of Alliant's distinctions as broker/consultant is how we coordinate and customize our personnel resources to optimize their effectiveness.</p> <p>Our Benefits account management model includes the following key personnel:</p>

- Account Executive/Benefits Team Leader: Responsible for overall client satisfaction and direct management of the account team.
- Account Manager: Primary day-to-day contact for plan administration related issues, vendor management, and project management lead.
- Strategic Consultant: Oversees execution of deliverables and provides benefits and compliance/legislative expertise.
- Financial Lead/Actuary: Updates financial analyses, manages marketing, and renewal process.
- Subject Matter Experts (SMEs): The SMEs assigned to your team represent all the specialized disciplines needed to help implement Sourcewell's program (e.g.; Compliance; Pharmacy based on your RFP and Scope of Services). The SMEs are supported by their national practices, but report to and are managed by your Account Executive/Benefits Team Leader for Sourcewell.
- Executive Leadership: Alliant's Executive Sponsor and Relationship Manager provide oversight; issue escalation; and assignment of additional firm resources if needed.

Together, they direct all strategic, management, and financial functions for your account.

Your Account Executive/Benefits Team Leader assisted by the Account Manager also serve as points-of-contact for your executive management and HR/Benefits department; both on a day-to-day and as-needed basis.

All account team members (who average 20+ years of industry experience) are assigned with the goal of having a long-term, ongoing relationship with Sourcewell. This includes our SMEs who, regardless of their department, report to more than one Benefits Team Leader on a case-by-case basis. No SME is tied to a specific territory or line of business. As a result, Alliant can leverage our intellectual capital to the best advantage of every individual client—but without having to impose time limits, territorial restrictions, or chargeback costs.

Property and Casualty Team:

The Alliant ONE P&L structure allows us to serve our clients in a manner that is unmatched by any other broker. We are ONE team. There are no silos by product or separate departments for broking and placement. Alliant's ONE team structure, which is a cornerstone of our culture, mandates that we bring the best brokerage talent to the client to manage specific, complex assignments. Being privately owned means that we answer to our clients—not stock analysts or stockholders.

Our core mission is to provide our clients superior expertise, teamwork, innovation, and market leading insurance solutions. Our industry specialist are leading authorities in modeling, analytics, risk transfer and mitigation strategies.

Though there is value in having local representation, it is our belief there is immeasurable value in having a team of public entity specialists with national experience and a global perspective at one's disposal. Our entrepreneurial approach is what makes Alliant different from all other brokers. We focus exclusively on what we do best—broking and risk management consultation.

Our business model eliminates geographic boundaries and regional profit centers. There are no financial restrictions deploying the best expertise for clients. We will collaboratively identify which resources will help drive the best possible results for each of your members. Our goals, as a firm, are reflected in our results which are based upon:

- A client-first service model.
- No manufactured corporate/overhead expenses.
- No geographic conflicts.
- Industry innovation through proprietary technology products.
- Flat management structure.
- Competitive advantage with specialty market expertise.
- Attraction and retention of high-quality, experienced talent.

This approach is underpinned and deeply rooted by executing and being:

Attentive: We will treat this engagement with the utmost care; we will provide our services with a commitment to professionalism, trust, and the highest level of personal and professional integrity.

Proactive: We are committed to understanding the goals and needs of each of your members and providing our best service, consulting advice and deliverables. We will provide our clients with innovative solutions and opportunities with an eye towards continuous improvement and risk transfer efficiencies.

Responsive: We will respond to your member's needs in a timely and professional manner; we will return all voicemail and email communication in accordance with our agreed-upon service standard guidelines; we will deliver and review our work product on a timely and as-agreed basis.

These guiding principles have allowed our firm to recognize an industry leading 98% client retention rate.

Our Property and Casualty account management model includes the following key

		<p>personnel:</p> <ul style="list-style-type: none"> • Team Leader: Responsible for overall client satisfaction and direct management of the account team. • Account Manager: Primary day-to-day contact for gathering and analyzing exposure data, program design, service deliverables and project management lead. • Account Administration: Provide day-to-day quality administrative services, including such items as certificate processing, endorsement requests, policy review, policy summaries and invoicing. • Subject Matter Experts (SMEs): The SMEs assigned to your team represent all the specialized disciplines needed to help implement your member's program. The SMEs are supported by their national practices, but report to and are managed by the Team Leader for your members. • Executive Leadership: Alliant's Executive Sponsor and Relationship Manager provide oversight; issue escalation; and assignment of additional firm resources if needed.
94	<p>What is your process for ensuring customer satisfaction?</p>	<p>Our mechanism is simple, straightforward, and effective: We ask. We listen. We respond.</p> <ul style="list-style-type: none"> • Client satisfaction is an agenda item at every meeting (whether in-person, virtual, or by phone). • We employ a Benefits Service Calendar to document and track the progress of your benefits program. The calendar also serves as a record of Alliant's service commitments, holding us accountable for their fulfillment. • De-personalized, HIPAA-compliant employee feedback is reported through the Benefit Advocates, our internal employee help desk. This feedback may identify employee satisfaction issues, which Alliant would investigate and take steps to resolve. • Your Executive Sponsors will check in quarterly (at minimum) with the client's HR & benefits team to ensure that Alliant's performance is meeting expectations. • We will conduct an annual stewardship meeting with the client. During this meeting, we "look back" and discuss program results from the completed plan year. This discussion will include overall client satisfaction and whether any changes in Alliant's service delivery are called for. <p>Alliant measures client satisfaction by:</p> <ul style="list-style-type: none"> • Creating and maintaining a log of all the client satisfaction interactions listed above, which we translate into a client satisfaction "scorecard" that we share with Sourcewell. • Distributing online client satisfaction surveys to both Sourcewell management and plan members. The questions on each will address the different services we provide/manage for each group, and Alliant will share the results with Sourcewell. Alliant will immediately respond to any issues regarding client satisfaction identified through the above initiatives, reporting to Sourcewell on our progress through final resolution.
95	<p>What kind of training (industry, internal, computer, other) does your staff receive?</p>	<p>Our staff at Alliant undergoes extensive initial and recurring training to ensure they are well-prepared to meet the needs of our clients. The training includes:</p> <ul style="list-style-type: none"> • Industry Training: HIPAA and Cyber Security training, carrier/vendor continuing education for insight into current trends and products in the marketplace. • Internal Training: Required annual 4-hour compliance training for every office/region (ERISA, COBRA, HIPAA, ACA, etc.), required 'Compliance 101' training for every new hire, bi-monthly staff training on compliance updates. • Computer Training: Training on advanced benefit products, healthcare innovation, and computer software through our Learning Management System (LMS), Aspire. • Other Training: Alliant's formal LMS contains hundreds of training modules, and managers assign internal corporate training through the LMS. Additionally, we have a dedicated national trainer who rolls out additional programs to improve our employees' client support services.
96	<p>How can you assist in facilitating employee meetings?</p>	<p>We assist in facilitating employee meetings by hosting on-site group enrollment meetings and conducting virtual meetings using internal systems or the client's preferred technology. We prepare and present engaging open enrollment presentations, benefit changes, and other relevant information. Our comprehensive enrollment strategy includes planning, facilitating, and conducting open enrollment meetings, benefit fairs, and other employee meetings. We also provide digital and interactive means of communication, such as Brainshark and FlippingBook, to ensure employees can access information conveniently. Additionally, we support the creation of communication materials and coordinate with insurance carriers for materials and attendance at meetings.</p>

97	How do you assist in facilitating employee meetings regarding solutions in your proposal?	<p>We can attend, host, and prepare presentations for meetings with Benefit/HR teams and committees, as well as your leadership team, whether they be monthly, quarterly, etc. Our team will present at regular meetings, help establish agendas, and provide renewal strategies, ACA updates, and legislative guidance. We review reporting packages, provide benchmarking data, and offer options for plan design changes along with decrements. We establish short-term and long-term goals, provide education on market trends, and field questions and suggestions. We assist in facilitating employee meetings by hosting on-site group enrollment meetings and conducting virtual meetings using internal systems such as Zoom, WebEx, and Teams, or the client's preferred technology. We prepare and attend open enrollment meetings, benefit fairs, and other employee meetings. Our Client Service Team is actively involved in planning, facilitating, and conducting all required open enrollment meetings, coordinating with insurance carriers for materials and attendance. We also offer digital and interactive means of communication, such as recorded presentations on the Brainshark platform and FlippingBook for digital booklets. Additionally, we provide a comprehensive communications campaign tailored to meet specific client needs, including benefits guides, email announcements, and open enrollment presentations.</p>
98	What resources do you use to analyze and file medical and pharmacy claims?	<p>pharmacy claims? Alliant Employee Benefits does not directly file medical or pharmacy claims, as this function is typically handled by the respective carriers or third-party administrators. However, we play a vital role in analyzing medical and pharmacy data (when it is available from the carriers or TPA's) to provide actionable insights and support decision-making for our clients. Our analysis is powered by advanced data tools and resources, including:</p> <ol style="list-style-type: none"> 1. Claims Data Analytics Platforms: We utilize cutting-edge platforms to aggregate and analyze claims data, identifying trends, cost drivers, and opportunities for savings across medical and pharmacy benefits. 2. Benchmarking Tools: Our resources allow us to compare your claims experience against industry benchmarks and peer organizations, offering a clearer understanding of performance and competitiveness. 3. Predictive Modeling Software: Using predictive analytics, we evaluate future risk exposures and cost projections, helping to identify potential high-cost claims or areas for intervention. 4. Pharmacy Benefit Analysis Tools: Specialized pharmacy data tools enable us to assess utilization patterns, formulary adherence, and the financial impact of specialty drugs, ensuring plans are effectively managed. 5. Carrier and Vendor Data: We work closely with carriers and pharmacy benefit managers (PBMs) to access detailed claims data and reports, ensuring accuracy and completeness in our analysis. 6. Custom Reporting Solutions: We provide tailored reporting dashboards that highlight key performance indicators (KPIs) such as claims cost per member, utilization rates, and wellness program outcomes. 7. Clinical and Actuarial Expertise: Our team includes clinical consultants and actuaries who bring specialized knowledge to interpret data, assess plan performance, and recommend cost-containment strategies. <p>Through this comprehensive analysis, we empower our clients to make informed decisions, optimize benefit design, and implement strategies that drive both cost savings and improved health outcomes for their employees</p>

99	Will your organization complete a provider analysis of physicians, clinics and hospitals that treat our plan participants?	<p>Yes, Alliant performs the following analyses to evaluate both network access and provider quality.</p> <p>Network Access:</p> <ul style="list-style-type: none"> • GeoAccess Report: Utilizing the home zip codes of plan members, we can identify potential geographical gaps in network coverage. This report is provided on an annual basis to determine whether any changes in your member population or the providers they utilize have resulted in network access issues. When we identify insufficient network coverage, it may require us to market for a new solution, or we may address the access issue directly with the existing vendor to ensure adequate coverage. • Disruption Report: This report assists us in determining if there would be any provider disruption to plan members, as well as assessing any associated cost impact, should Sourcewell pursue a network change. Disruption reports are provided prior to recommending any renewal changes to eliminate network access concerns. By analyzing potential disruptions, we ensure continuity of care and minimize any negative impact on plan participants. <p>Provider Quality Analysis:</p> <ul style="list-style-type: none"> • Provider Performance Evaluation: Leveraging various performance metrics, we evaluate the quality of physicians, clinics, and hospitals that treat your plan participants. This includes reviewing clinical outcomes, patient satisfaction scores, and provider credentials. By systematically analyzing these factors, we help ensure that plan members receive high-quality care from reputable providers. • Utilization Review: We conduct thorough reviews of provider utilization patterns to identify trends and anomalies. This involves examining the frequency and types of services rendered, which helps us determine if the care provided is both necessary and appropriate. • Cost Efficiency Analysis: By analyzing the cost-effectiveness of providers, we identify opportunities to optimize expenditures without compromising the quality of care. This involves comparing costs across different providers and identifying best practices in cost management. <p>Overall, through these comprehensive analyses, Alliant aims to maintain and improve both the network accessibility and the quality of healthcare services available to your plan participants, ensuring that they have access to top-tier providers whilst navigating any potential disruptions efficiently.</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>Alliant offers a comprehensive approach to help public sector clients manage benefits and outline a benefits strategy consistent with current and future business plans. Our resources include a systematic approach to consulting on current plan offerings and making cost-effective recommendations. We provide clear and concise reporting to understand benefit plan performance, including claims experience data, utilization patterns, plan costs, and trends. Our platform includes full-service, in-house underwriting and actuarial support to challenge carrier assumptions and ensure value for benefit plan costs. Additionally, we offer customized benchmarking data, predictive modeling, and a three-stage approach to designing benefit strategies: discovery and development, delivery, and measurement. We also provide an annual Benefits Service Calendar to capture all major tasks and deliverables, ensuring accountability and timely fulfillment of responsibilities. Our team is experienced in public sector needs and offers innovative solutions, vendor management, and compliance support to align with your strategic goals.</p>
101	How can you help governments develop cost projections tied to their fiscal goals?	<p>Our analytics team will oversee this discipline, and our Alliant governmental consulting team specializes in the realm of budget work, recognizing its year-round nature. We employ Financial Monitoring Reports (FMR) consistently throughout the year, with proper cadence based on client team strategies and needs. The budget and projection models aid our team in annual plan building strategies, during the RFP process, budget crunch times, and monthly assessments for ongoing plan performance. We create financial tracking reports for direct contracted cohort ROI vendors, IBNR reports, etc. We believe in the necessity of financial analytical reporting to monitor all cost/utilization impact areas of the macro plan. Our approach is rooted in precision – no guesswork. We rely on forensic analytics to unveil the radical truth, identifying the driving factors behind our costs, whether they lead to savings or impact the cost trajectory.</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 addition to our Claims Analysis methodology, Alliant adopts a unique approach to analyzing data, as we have found that reviewing raw numbers or analytics alone is not enough to support the overall health of the plan and may be incomplete in articulating a clear story with “so what?” insights. We provide regular reporting, meaningful context, calls to action, and proposed strategy that is strengthened by a myriad of data sources. The material is dissected and analyzed by our experts (actuaries, nurses, and informatics SMEs), and delivered in concert with the core service team, who also have a depth of experience in plan economic management and performance. The blending of our clinical and actuarial teams is what sets Alliant apart from other benefit advisors.</p> <p>Large clients would receive the following financial reporting from Alliant:</p> <ul style="list-style-type: none"> • Monthly experience reporting: details medical, dental and vision enrollment, actual costs vs. budget, high-cost claimant activity and additional financial metrics in a clear, concise reporting package. See our Sample Experience Report. • Quarterly IBNR reporting: reserve calculations for self-funded plans to articulate a client's overall liability should the plans terminate for any reason. • Annual renewal projections provides clients with a projected estimate of your renewal, based on your year-to-date claims experience. • Alternative funding feasibility analysis: forecast projecting guaranteed fully insured cost vs. expected self-funded cost plan components (i.e., fixed fees, expected claims, reinsurance, etc.)
103	How does your firm stay current with state regulations that impact multi-state employers?	<p>National Expertise: Alliant has offices throughout the United States. Our national presence empowers us with access to information and existing relationships in other markets which ensures that our clients in every state receive expert consultation including legal regulations pertaining to the specific needs of their entire employee base.</p> <p>Our Compliance department includes regulations for all states in their regular communications and updates. They also offer additional resources and tools for employers such as:</p> <ul style="list-style-type: none"> • Medicaid expansion information by State • Health care reform information by State • State paid Family Leave information • State by state table on whether to impute income for domestic partners
104	Will your firm notify your client of changes in federal and/or local laws that would affect us?	<p>Yes, Alliant will notify your organization of changes in federal and/or local laws that would affect you. Our national Compliance Department, staffed by experienced attorneys and benefits professionals, will keep you informed, educated, and prepared regarding the latest compliance requirements and potential legal exposures. We utilize a wide range of communication formats and media throughout the plan year, including weekly newsletters, timely compliance alerts, quarterly client webinars, podcasts, white papers, and hands-on resources. Additionally, your compliance attorney/consultant on Alliant's account team will be available to answer questions and provide general guidance on regulatory issues.</p>
105	Explain what steps you have taken to become HIPAA compliant.	<p>We have taken several steps to become HIPAA compliant. These include the designation of a privacy official responsible for policies and procedures, and a contact person for receiving complaints and providing additional information. We train our workforce on privacy policies and procedures and implement appropriate safeguards to protect PHI from inadvertent disclosure, such as IT firewalls, locked cabinets, Clean Desk policy, and PC security protocols. We have created a process for receiving and responding to complaints and keeping a record of the complaints and their resolution. We adhere to a Vendor Selection and Management policy related to HIPAA, report improper breaches as required by law, and mitigate any known harmful effects that result from improper use or disclosure of PHI. Additionally, any electronic transmission of PHI outside of the Alliant network must be sent through encrypted email.</p>

106	What is your process for measuring the success or failure of a wellness program?	<p>Approximately 50% of healthcare costs are linked to modifiable behaviors. Promoting healthier lifestyles among employees can significantly reduce healthcare expenses. Our first step is to use data to diagnose issues before proposing solutions. Our health informatics team combines clinical expertise and data analytics to understand health risks at both macro and micro levels. We analyze medical, prescription, dental, and vision claims to pinpoint problems and address them with targeted strategies. Understanding the populations most affected allows us to design effective programs that leverage health plans, well-being activities, condition management, and onsite services to reduce risk, lower costs, and improve quality of life.</p> <p>Our advanced reporting connects data from multiple vendors into a single, agnostic data warehouse, creating dashboards tied to wellness programs and initiatives. This enables us to analyze healthcare spending and utilization from a group level down to individuals, identifying cost savings and enhancing employee engagement.</p> <p>We integrate health and productivity into the employee benefits landscape, discussing well-being in annual planning to meet specific objectives, from fostering a culture of well-being to implementing formal programs. Alliant's in-house health and productivity consulting team develops and manages custom programs.</p> <p>Alliant's "diagnose and prescribe" approach aims to control healthcare costs and boost productivity by reducing sick days, improving presenteeism, lowering turnover, enhancing recruitment, and improving morale. Additional benefits include reduced disability and workers' compensation claims. Our structured health and productivity programs boast participation rates over 80%.</p>
107	Describe how you keep your clients abreast of employment laws in a timely manner.	<p>We keep our clients abreast of employment laws in a timely manner through a comprehensive, tailored, and proactive approach led by our experienced on-staff attorneys. Our Employee Benefits Compliance department remains current with federal and state regulatory agencies, including the IRS, DOL, HHS, and CMS. We ensure our clients stay informed of all relevant developments by issuing timely Compliance Alerts on new guidance and providing weekly updates on a broad range of group health plan compliance issues through our 'Friday Fast Facts'. Additionally, we facilitate a practical understanding of these developments by conducting quarterly client webinars, producing our 'Compliant with Alliant' podcast series, maintaining a large library of support tools, and engaging directly with clients. Our department also offers hands-on support through resources such as our HIPAA Toolkit, Healthcare Reform Review Tool, and ACA Employer Reporting Guide. Furthermore, our Employee Benefits Compliance Department is available for daily compliance question-and-answer support.</p>
108	What types of materials can you provide to communicate pertinent information to client's employees?	<p>We provide a comprehensive range of materials to communicate pertinent information to client's employees, including but not limited to:</p> <ul style="list-style-type: none"> • Benefits Summary: Customizable brochures that can be distributed as PDFs, posted online, and/or printed and distributed. • Open Enrollment Email Announcements: Series of emails leading up to open enrollment, communicating benefit changes, employee action steps, and meeting schedules. • Postcards: Announcements ahead of open enrollment, professionally printed and mailed to employees' homes. • Posters: Worksite posters to remind employees about open enrollment dates and action steps. • Open Enrollment Presentations: Engaging presentations summarizing benefit changes for the coming year, available in-person, online, or pre-recorded. • Educational Videos: Videos on numerous benefits topics to help employees and dependents understand their benefits. • MyBenefits.Life: A proprietary mobile application and web portal providing 24/7 access to benefits information, provider details, and more. • Wellness Program Announcements: Newsletters and reminders about wellness programs, flu shots, preventive care, etc. • QR Codes: Quick response codes for easy access to important benefits content. • Face-to-Face Meetings: On-site education and support for employees. • Additional materials such as compliance notices, benefit guides, enrollment booklets, and more. <p>For samples of our communication materials, please visit: https://alliantbenefits.cld.bz/Alliant-Sample-Communications</p>

109	What provisions do you offer for after-hours claims support?	<p>P&C claims support is 24/7.</p> <p>Employee Benefits Your core Alliant team will specifically manage escalated employee claims or access to healthcare issues that Benefit Advocate Services cannot resolve. As a preferred broker to many of the industry's most predominate carriers and vendors, we leverage the strength of our relationships with both our day-to-day and leadership contacts to resolve escalated employee issues quickly and accurately. Our team will monitor Benefit Advocate Services utilization reports for recurring themes in employee's obstacles and deploy the investigations and audits to ensure the root cause is identified and resolved to create the optimal experience for all plan participants. Alliant's Benefit Advocacy Call Center service is available to you and includes highly trained professionals that help employees, retirees (and their dependents) with general benefit questions, benefits education, prescription problems, claims questions and COBRA issues. This elite team of benefits professionals know how to navigate the carriers and solve claims, network, and other benefits issues, saving your people hours of time and potential frustration. Service team members educate the advocate on their client's plans, eligibility rules, networks, enrollment process including Benefits Administration system if desired, and portals. They are also provided with carrier contact information, plan documents and any communication materials, so they are always up to date on Sourcewell's specifics. Advocates are available Monday through Friday from 5 AM to 5 PM PST.</p> <p>Single point of contact, multilingual response. Alliant Advocates are available via email or phone. We work with an interpretation service that supports 240+ different languages, providing the following help to your employees, retirees, and dependents:</p> <ul style="list-style-type: none"> • Benefit-related questions • Claims questions • Prescription issues • Enrollment and eligibility information • FSA questions • COBRA-related issues • Medicare questions <p>Our Advocates work in a system that is fully compliant and actively monitored to ensure information is secure and confidential. In addition, our online platform gives us the ability to track and identify trends across your organization, including claims problems with specific carriers, higher volume issues, and utilization reporting and benchmarking.</p>
110	How does your firm assist in analyzing NCCI EMOD calculations?	<p>Alliant's Workers' Compensation Services is key in controlling claims, we provide claims advocacy, risk management, loss control, experience modification reduction and experience modification review and projections. What do our advocates due: Education and support for our clients</p> <p>We speak the language of the claim adjuster and can help our insured to understand the WC and litigation process and communicate questions, concerns and suggestions for further action directly to the carrier.</p> <p>Rapidly close claims</p> <p>An ignored claim is sometimes the only reason it is an open claim; we ensure our insured's claims are on the "top of the stack" and close timely or continue to make forward progress to resolution.</p> <p>Reduce reserves</p> <p>Quarterly monitoring of claim reserves to ensure accuracy and impact on experience rating.</p> <p>Eliminate errors in experience rating</p> <p>Auditing of experience rating worksheets and loss runs to ensure not only accuracy, but opportunity for recalculation as well.</p> <p>Project experience ratings</p>
111	Explain how your firm assists with proactive budgetary projections prior to policy renewal?	<p>Our firm assists with proactive budgetary projections prior to policy renewal by breaking down a typical plan budget into its constituent components, including fixed costs, claims cost, and reserves. We engage in open dialogue with clients to capture all relevant cost components and ensure compliance. For claims cost, we incorporate multiple data points such as client-specific historical experience and community statistics. Where appropriate, we also establish IBNR and Claim Fluctuation Reserves (CFR) forecasts. Our approach includes using simulation methods to provide a range of outcomes and likelihoods. Once the forecasted plan year begins, we track performance monthly via our financial reporting, aiming for an accuracy of +/- 5% relative to the forecast. We are transparent in our forecasting process and assumptions, enabling clients to make informed decisions on reserving to meet budget goals.</p>

112	What services does your firm provide for audit assistance?	<p>Our firm offers comprehensive audit assistance tailored to meet the needs of employee benefits programs. This includes compliance audits to verify that your benefits programs align with regulatory requirements, such as ERISA, ACA, HIPAA, and other relevant standards.</p> <p>In addition, we conduct benefit plan design audits to evaluate the structure and effectiveness of your benefits offerings. These audits analyze whether your plan design meets the needs of your workforce, aligns with organizational goals, and remains competitive within your industry. By identifying areas for improvement, we help you optimize your benefit plans to support employee satisfaction, cost-efficiency, and regulatory compliance.</p> <p>Our audits are designed to enhance transparency, mitigate risks, and improve overall program performance, providing you with actionable insights and peace of mind.</p>
113	Provide an example of how your firm has helped a Public Sector Entity with claims management?	<p>Alliant Claims Consulting Capabilities</p> <p>Alliant fully understands that the true value of any insurance contract can only be determined by its response to loss. Our extensive experience working with public entities, has allowed us to develop a highly effective in-house claims department staffed by the most talented personnel in the industry who specialize in large, complex claims. Our claims consultants average over 35 years of experience and operates as a national team which affords borderless resources to our clients. Our team understands the process involved with large claims and will develop effective strategies to ultimately drive positive outcomes and recoveries in critical situations. Your lead claims advocate Robert Frey has the expertise and knowledge necessary to help manage claim submittals.</p> <p>Our claims team's most valuable role will be to function as your claim consultant and advocate on difficult and severe claims to achieve prompt and equitable claims settlements. Their goal will also be to complement and supplement your efforts in obtaining favorable claims resolutions while acting as the client's claims resource. As part of our comprehensive claims handling services, we will:</p> <ul style="list-style-type: none"> > Establish, in conjunction with the client and the carrier/TPA, special claim handling instructions that include notification procedures of claim adjustments and settlements at a specified dollar amount. > Provide oversight of the adjustment and settlement of claims by the carrier/TPA. > Present analysis of insurance coverage and advise the client on coverage application to specific claims. Advocate on behalf of the client in connection with all claims particularly those that involve disputed coverage issues. > Assist in coordinating, monitoring, reviewing, and evaluating the claims services provided by insurers. > Scrutinize carrier loss runs to ensure accuracy. > Coordinate carrier/ claim reviews, distribute loss data, and discuss outstanding claim issues with the client and the carrier. > Marshall all documents necessary for effective tenders of defense, where applicable. > Recommend legal counsel where appropriate after consultation with the client. > Advise the client continually on the progress of contested or questionable claims. <p>Your broker team will also serve you in a claims capacity and can advise on day-to-day activities such as claims reporting and policy coverages.</p> <p>Expedited claims resolution is always important and even more-so in today's current hard insurance marketplace, an industry dependent on cash flow, claims payments or securing partial payments is key through advocacy resources. Our designated team will guide you through the claims process and will provide you with the best possible service. We understand your business and will manage all your needs, from triaging all your claims to finalizing a settlement and everything in between. We offer:</p> <ul style="list-style-type: none"> > 24/7 claims support and advocacy. > Dedicated claims specialist and team. > Continuous monitoring. > Property claims oversight.

114	Provide an example of how your firm has helped a public entity to save money Workers Compensation?	<p>Through our workers' compensation claims advocacy program, we provided a healthcare district client with an assigned senior level consultant, who collaborated with the client to reduce open claims within their self-insured retention, negotiate their third-party claims adjusters fees/contract, which produced within the first two years over a \$1,000,000 savings in the overall program costs. Services included:</p> <ul style="list-style-type: none"> • Develop and administer the RFP process for TPA services along with providing a detailed analysis on each responder • Provide advocacy services for workers' compensation claims • Assist in developing a more efficient and cost savings program • Attend depositions on high severity and difficult litigated claims • Assist and provide direction of quarterly claims reviews and audits • Provide consultation and direction on claims where additional expertise is needed • Assist with evaluation of reports, trends, and offer cost mitigation strategy • Provide guidance and advocacy throughout • Provide total cost of risk based on the performance of claims, estimated cost of TPA and your excess workers compensation premium spends
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Table 7B: 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	n/a	*
116	Comprehensive Risk Analysis	<input checked="" type="radio"/> Yes <input type="radio"/> No	n/a	*
117	Claims Prevention and Mitigation	<input checked="" type="radio"/> Yes <input type="radio"/> No	n/a	*
118	Incident Response and Recovery	<input checked="" type="radio"/> Yes <input type="radio"/> No	n/a	*
119	Worker's Compensation Safety Programs	<input checked="" type="radio"/> Yes <input type="radio"/> No	n/a	*
120	Regulatory Compliance and Governance	<input checked="" type="radio"/> Yes <input type="radio"/> No	n/a	
121	Technology and Data Analytics Integration	<input checked="" type="radio"/> Yes <input type="radio"/> No	n/a	
122	Strategic Risk Advisory Services	<input checked="" type="radio"/> Yes <input type="radio"/> No	n/a	
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	n/a	
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	n/a	
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	n/a	
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	n/a	

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](#) - Alliant Insurance Services_Pricing and Scope of Services_Sourcewell RFP 012125.pdf - Friday January 17, 2025 13:31:09
 - [Financial Strength and Stability](#) - 2023 Alliant Holdings L.P. Consolidated Financial Statements.pdf - Wednesday January 15, 2025 15:27:15
 - [Marketing Plan/Samples](#) - Alliant Insurance Services_Sourcewell Marketing Samples.pdf - Thursday January 16, 2025 17:49:35
 - WMBE/MBE/SBE or Related Certificates (optional)
 - [Standard Transaction Document Samples](#) - Alliant Insurance Services_Sample Client Service Agreement and BOR Letter.pdf - Thursday January 16, 2025 17:53:08
 - [Requested Exceptions](#) - Alliant_redlines and exceptions summary_Sourcewell_Final.pdf - Wednesday January 15, 2025 15:28:34
 - [Upload Additional Document](#) - Alliant Insurance Services Team_Sourcewell.pdf - Thursday January 16, 2025 18:04:21

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. - Patricia Moore, First VP, Consultant, Alliant Insurance Services, Inc.

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