

Purchase Request #5
Regular Board Meeting June 2, 2025
Consideration of Approval to Contract for Casualty Insurance Brokerage and
Risk Management Services

ADMINISTRATION RECOMMENDATION/REPORT

The administration recommends that the Board of Trustees approve a contract for casualty insurance brokerage and risk management services with USI Southwest, Inc. (USI) for all the College's campuses, district offices, and extension centers.

BACKGROUND

USI has provided casualty insurance brokerage and risk management services for the College since at least 2017 when the last solicitation process was performed. Such coverage includes automobile liability, general liability, umbrella liability, law enforcement liability, educators' legal liability, crime, cyber liability, international travel coverage, environmental pollution policy, student professional liability, and an active shooter/malicious attack liability policy.

Request for proposals (RFP) #25-26 was issued on March 31, 2025, to procure casualty insurance brokerage and risk management services, which complies with the competitive procurement requirements per Texas Education Code §44.031(a). One response was received and evaluated by a team comprised of representatives from facilities services; office of emergency management services; safety, health, environment and risk management services (SHERM); and internal audit services who determined the proposal submitted by USI will provide the best value to the College.

IMPACT OF THIS ACTION

Approval of this request will allow the College to award the contract to USI, who will continue providing casualty insurance coverage and safeguard the College from any legal and financial liabilities.

BUDGET INFORMATION (INCLUDING ANY STAFFING IMPLICATIONS)

The estimated annual expenditure is \$360,000, which includes both the estimated premiums and services charges, and will be funded by the SHERM department's 2025-2026 operating budget and subsequent years budgets. The renewal process for the casualty liability insurance is anticipated to occur in July and the new premiums will be effective beginning September 1, 2025.

MONITORING AND REPORTING TIMELINE

The initial term will commence on September 1, 2025, through August 31, 2026, with four one-year renewal options.

ATTACHMENTS

Attachment 1 - Tabulation

RESOURCE PERSONNEL

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Attachment 1 - Tabulation

QUALIFICATIONS

#	Vendors	Section 1: Firm & Personnel Experience	Section 2: Project Understanding	Section 3: Broker Key Metrics	Section 4: References	Section 5: Exceptions to T&Cs	Total Points
	<i>Total Points</i>	25	30	10	10	5	80
1	USI Southwest, Inc.	23.13	28.50	9.25	8.50	5.00	74.38

FINAL SCORES

#	Vendors	Qualification Score	Price Score	Final Score
	<i>Total Points</i>	80	20	100
1	USI Southwest, Inc.	74.38	20.00	94.38