

**Massachusetts School Building Authority
Request for Quotes**

Date: May 12, 2026

Project: Request for Quotes (“RFQ”) for Insurance Consulting Services

Project Number: MSBA-Insurance Consulting Services-2026

RFQ Contact Person: Siobhan Tolman, Procurement and Contracts Manager

SECTION I. SUMMARY

The Massachusetts School Building Authority (“MSBA”) is seeking quotes from firms who provide insurance consulting services.

Minority Business Enterprise (MBE), Women Business Enterprise (WBE), Veteran Business Enterprise (VBE), Minority and Women Business Enterprise (M/WBE), Service-Disabled Veteran-Owned Business Enterprise (SDVOBE), Veteran-Owned Business Enterprise (VBE), Minority Nonprofit Organization (M/NPO), Women Nonprofit Organization (W/NPO), Minority and Women Non-Profit Organization (M/W/NPO), Disability-Owned Business Enterprise, or LGBT Business Enterprise, firms are encouraged to submit Responses.

A. OBJECTIVES

This RFQ intends to select a qualified insurance consultant to perform a comprehensive, independent review of the existing MSBA insurance policies and related risk management practices. The insurance policies include, but are not limited to, workers' compensation insurance, cyber insurance, property insurance, general liability insurance, umbrella insurance, and auto insurance. The consultant will evaluate the structure, scope, and effectiveness of current insurance policies and provide strategic, data-driven recommendations to MSBA leadership and its insurance broker in advance of the renewal of MSBA insurance policies. **The Scope of Work detailed below shall be completed on or before July 15, 2026.**

B. SCOPE OF WORK

The MSBA anticipates that the scope of work for the selected firm may include, but not be limited to, the following:

- **Insurance Program Evaluation**
 - Review existing insurance policies, limits, deductibles, exclusions, and endorsements.
 - Evaluate adequacy of coverage for operational risks.
 - Identify coverage gaps, overlaps, or unnecessary costs.
 - Recommend changes to improve coverage or reduce risk exposure.

- **Cyber and Technology Risk**
 - Cyber liability insurance review.
 - Data breach response planning.
 - Ransomware and privacy exposure analysis.
 - Recommend changes to improve coverage or reduce risk exposure.
- **Benchmarking and Market Analysis**
 - Compare insurance programs against peer public agencies/authorities or industry standards.
 - Analyze market conditions and pricing trends.
 - Evaluate alternative insurance structures or financing mechanisms.
 - Provide renewal strategy recommendations.
- **Advisory Support**
 - Provide ongoing on-call consulting support. This is not subject to the July 15, 2026, deadline.
 - Provide claims assistance if needed (paperwork and documentation). Ongoing support that is not subject to the July 15, 2026, deadline.
 - Advise on coverage levels and suitable insurance products – help the MSBA make informed decisions regarding products and coverage to ensure a comprehensive insurance program.
 - Assist in developing “marketing” information that explains the MSBA’s program and financials for the purpose of increasing marketability.
 - Assist in communicating recommendations for insurance coverage to the MSBA’s insurance broker in advance of the renewal of MSBA insurance policies.
- **Extra Services**
 - The MSBA may request extra related insurance consultant services for which the MSBA and the selected Respondent will work in good faith to negotiate the scope and price of such services.
 - Extra services may include, but not be limited to, the review and recommendation of changes to the standard construction insurance requirements for MSBA-funded school construction projects to align with construction industry standards. This extra service would not be subject to the July 15, 2026, deadline.

SECTION II. GENERAL INFORMATION

All terms, conditions, requirements, and procedures included in this RFQ should be met for a Response to be qualified as responsive. The MSBA reserves the right to determine whether a Response is non-responsive and to waive or permit cure of any and all non-material errors or omissions. The MSBA reserves the right to modify, amend or cancel the terms of this RFQ at any time. All Responses must be submitted in accordance with the specific terms of this RFQ.

A. SPECIFICATIONS

1. **Respondent Communication.** All communication regarding this RFQ must be **in writing** via email to the RFQ Contact Person, Siobhan Tolman, Procurement and Contracts Manager. Any Provider that intends to submit a quote is prohibited from contacting any employee of the MSBA or Member of the BOD other than the Contact Person regarding this RFQ. **Failure to observe this rule may result in disqualification.** Furthermore, no other individual

MSBA employee or representative is authorized to provide any information or respond to any question or inquiry concerning this RFQ and the MSBA shall not be bound by any such unauthorized provision of information or response. Respondents should notify in writing via email the Contact Person for this RFQ in the event it is incomplete or the Respondent is having trouble obtaining any required attachments electronically through COMMBUYS or from the MSBA's website.

2. **Best Value Selection and Negotiation.** The MSBA intends to select the response that demonstrates the "Best Value" overall, including proposed alternatives that will achieve the procurement goals of the MSBA. The MSBA and the selected Respondent may negotiate a change in any element of contract performance or cost identified in the original RFQ or the selected Respondent's Response which results in lower costs or in a more cost effective or better value than was presented in the selected Respondent's or contractor's original Response.
3. **COMMBUYS:** This RFQ has been distributed electronically using the COMMBUYS system. RFQ Attachments that are referenced are available either as separate files along with the RFQ, or in the COMMBUYS Attachments section.

Respondents are solely responsible for obtaining and completing the required attachments that are identified in this RFQ; for regularly checking COMMBUYS for any addenda or modifications that are subsequently made to this RFQ or attachments; and for obtaining, reviewing and appropriately responding to any such addenda or modifications to the RFQ or attachments. The MSBA accepts no liability and will provide no accommodation to Respondents who fail to check for, obtain, review and appropriately respond to addenda or modifications to the RFQ and attachments, and then submit inadequate or incorrect Responses. Respondents are advised to check COMMBUYS to ensure that they have the most recent RFQ files. Respondents may not alter (manually or electronically) the RFQ language or any RFQ component files. Modifications to the body of this RFQ, specifications, terms and conditions, which change the intent of this RFR are prohibited and may disqualify a Response.

B. PROCUREMENT CALENDAR

The following is the tentative time schedule for the MSBA's selection of a Respondent. All dates are subject to modification by the MSBA with notice.

Issuance of RFQ – May 12, 2026
Question Deadline – May 19, 2026, by 5:00 PM E.S.T.
Responses to Questions Posted – May 22, 2026
RFQ Response Deadline – May 27, 2026, by 12:00 PM E.S.T.
Award of Contract – Anticipated May/June 2026

Questions concerning this RFQ may be submitted to the RFQ Contact Person in writing via email at the contact information below. No telephone Calls concerning this RFQ are permitted.

Siobhan Tolman, Procurement and Contracts Manager
ATTN: MSBA- MSBA- MSBA-Insurance Consulting Services-2026
E-Mail Address: Siobhan.Tolman@massschoolbuildings.org

SECTION III. RESPONSE REQUIREMENTS

A. CONTENT OF THE RESPONSE

All Responses to this RFQ should include the following information:

1. Experience and Qualifications

- a. Provide an overview of the firm, including size, structure, and years of operation.
- b. Provide a description of the firm's experience providing insurance consulting and risk advisory services to public entities.
- c. Identify the key personnel who will be assigned to the engagement, including relevant experience and qualifications, and resumes.

2. Quote

- a. Provide a detailed quote for the services listed above in Section I.B Scope of Work.

3. References

- a. Provide contact information for three current clients for whom the firm has delivered services on similar engagements. The MSBA reserves the right to contact references.

B. INSTRUCTIONS FOR SUBMISSION

Responses to this RFQ must be submitted electronically by the submission deadline, or the response will not be considered. **Hard copy submissions will not be accepted.** Responses must be submitted by email to Siobhan.Tolman@MassSchoolBuildings.org. Responses and Attachments received after this deadline date and time will not be evaluated.

Respondents are encouraged to submit responses in a timely manner to ensure successful delivery prior to the submission deadline. Respondents should receive an email confirming receipt of submission. If Respondents do not receive a confirmation email, Respondents are encouraged to contact Siobhan Tolman at Siobhan.Tolman@MassSchoolBuildings.org to ensure successful delivery of their submission.

Responses should not exceed 25MB in size. **The MSBA will not accept ZIP files. Responses should be submitted in a PDF.**

SECTION IV. EVALUATION PROCESS

A. PHASE ONE REVIEW

The MSBA will review the responses to this solicitation and select the response that provides the best value to the MSBA based upon the specified criteria below:

1. Experience and Qualifications
2. Quote

The MSBA will assign such weight as it deems appropriate and in the best interest of the MSBA, in its sole discretion, to each relevant factor that it takes into consideration.

Responses will be reviewed to determine which Respondent provides the best value to the MSBA and will receive the Contract award.

During the selection process, the MSBA reserves the right to take any or all of the following actions if it deems them to be in the interests of the MSBA:

- a. Reject any and all responses;
- b. Waive any minor informalities in responses received or request Respondents to correct them; and
- c. Request additional information from Respondents, including product demonstrations, and seek clarification from a Respondent provided the MSBA determines it is not prejudicial to the interests of the other Respondents to do so. Action by the MSBA in this regard should not be construed to imply acceptance or rejection of a response.

SECTION V. ADDITIONAL INFORMATION

A. DURATION AND RENEWAL OPTIONS

The MSBA intends to select one Respondent to provide the services solicited in this RFQ for a one-year term with two options to renew, at the MSBA's discretion, for one year each, under the same terms and conditions.