



Adair-Casey Community School District

Local Property and Casualty Insurance Agent Request for Proposal (RFP)

4/27/2026

Mission: Expect the Best. Every Charger, Every Day

Vision: Cultivate each individual and unlock their full potential.

Values: Empower, Engage, Inspire

School District Contact: Brandy Rudy, School Business Official

Phone: 641-746-2241

Email: brudy@acgcschools.org

School District Background

The School District

Adair-Casey Community School District – “The District” is a public school district located in Guthrie, Adair & Audubon Counties in rural Iowa. The district serves the cities of Adair and Casey.

The district has a whole-grade sharing agreement with the Guthrie Center Community School District, however both districts still operate as separate entities.

School District Governance

The school district is governed by an elected School Board comprised of five school board members. The School Board is responsible for risk oversight including:

- Reviewing risk to the school district and ensuring that steps are taken to mitigate or sufficiently ensure against those risks,
- Use of oversight mechanisms, such as independent audits and external reviews, to ensure accountability, to deepen understanding of the organization, and to reduce risks to loss of time, money or reputation of the school district,
- Ensuring that the district has adequate insurance, contingency plans, safety plans, and financial controls, and
- Hearing reports from administration regarding significant district exposure to loss of time, money or reputation. Ensuring the administration is identifying strategies to mitigate risks and prevent loss.

(Iowa Association of School Boards Standards for Effective School Boards)

School District Administration

The school district is administrated by:

- Josh Rasmussen, Superintendent,
- Brandy Rudy, School Business Official

The School District Administration officials are responsible for gathering information regarding property and casualty insurance RFP process information and making recommendations for the consideration and approval of the School Board.

School District Enrollment

The school district is serving 293.20 students during the 2025-26 fiscal school year.

Other information regarding the district’s facilities, transportation system, food services program, childcare programs, extracurricular activities and services is available upon request as needed.

Local Insurance Agent RFP Process Objectives

The School Board and the district administration desire to select a qualified local insurance agent to coordinate its property and casualty and workers compensation insurance risk management services.

The district seeks to identify an insurance agent that is active in the local community and supportive of public education. The local agent must demonstrate a comprehensive understanding of all risk management components of the insurance options. This Request for Proposal (RFP) shall require written analysis of the questions.

In person interviews may or may not be requested at the discretion of the school district.

Questions regarding the IASB Safety Group Insurance Program can be directed to Jester Insurance, the program's managing agent or EMC Insurance, the program's insurance carrier at:

Dale Anderson – dale.a.anderson@emcins.com – 515-345-2538

OR

Frank Spatafota – frank.g.spatafota@EMCIns.com – 515-240-2313

Local Insurance Agent RFP Questions

Please answer the following questions:

1. How many years has the Agency been in business? (5 points):

2. Identify the lead agent who would service the school district and describe that agent's school insurance experience and expertise. (25 points):

3. Describe your participation in insurance continuing education. In particular, describe your participation in the IASB Safety Group Insurance Program Seminars and/or agent workshops. (15 points):

4. Identify additional staff members in your agency who would be responsible for service to the district and the depth of their related experience. (15 points):

5. Describe your involvement in our local community. In particular, describe your involvement in the school district. (15 points):

6. A copy of the IASB Safety Group Local Insurance Agent Expectations is attached. Please describe your understanding of the time and dedication required to fulfill these expectations. Please describe any expectations you would not be willing and/or able to fulfill. (25 points):

Public Record Disclosure

Any information submitted in response to this Request for Proposal (RFP) may constitute a public record and be subject to disclosure in compliance with Iowa Code Chapter 22.

Proposal Response Format

Please provide one printed copies of your solution and response to this proposal. The school district requires an electronic copy of your solution and response to this proposal delivered to Brandy Rudy, School Business Official, brudy@acgcschools.org.

To provide consistency among the responses, the school district requests you to provide the following information with your response to this RFP.

Letter of Transmittal

In a standard business cover letter to your response, please include on company letterhead the following elements:

- A certification that the individual signing the letter is authorized to legally bind your company.
- A statement that you have read, understand, and agree to the terms and conditions in the RFP.
- A summary of any alterations to the terms and conditions in the RFP.
- A list of all subcontractors (carriers, claims administrators) that you are proposing to use within the insurance program. Please include the address, city, and country of all subcontractors. Please include a statement indicating whether each subcontractor is subject to the jurisdiction of the Iowa Insurance Division.
- The name and contact information of your key contacts, including your contact representative.

Please include detailed description of your company's credentials and experience along with three (3) references.

A point system is assigned to the questions in this RFP. The district will consider the total points awarded to each applicant but reserves the right to award the contract to the agent of its choice. The School District reserves the right to disregard incomplete submissions of the RFP requirements.

Proposal Submission

Proposals are due by May 13, 2026.

Please direct questions and submit proposals to:

Brandy Rudy, School Business Official
Adair-Casey Community School District
3384 Indigo Avenue
Adair, IA 50002
641-746-2241
brudy@acgcschools.org

