

YELLOWSTONE COUNTY, MONTANA
Request for Qualifications
Insurance Agent/Brokerage Services

1. Introduction

Notice is hereby given that Yellowstone County is seeking statements of qualifications from insurance brokerage firms to provide insurance brokerage and consulting services. Firms are invited to submit their qualifications for consideration in providing these services to the County.

2. Submission Requirements & Deadlines

To ensure a complete understanding of the scope of services requested, a mandatory, virtual Pre-Submittal Meeting will be held on Wednesday, December 3rd, at 1:00PM to answer questions from participants. This meeting will be held as a Microsoft Teams meeting. Please email Matt Kessler at mkessler@yellowstonecountymt.gov to receive an invite to the meeting. Attendance will be taken. Submittals that are received without a representative attending the Pre-Submittal meeting will not be considered.

Offerors shall submit five (5) hard copies of the submittal in a sealed envelope. All submittals must be labeled “**Insurance Agent/Brokerage Services**”. Submittals may either be mailed or physically delivered to the following addresses.

Mail To:

Yellowstone County BOCC
PO Box 35000
Billings, MT 59107

Physically Deliver To:

Yellowstone County BOCC
Ostlund Building, Room 420, 4th Floor
2825 3rd Ave N
Billings, MT 59101

All submittals must be received no later than 3:00 PM on Monday, January 26th, 2025.

Submittals received after this deadline will not be considered.

Timely submittals will be opened and acknowledged at 9:00 AM, on Tuesday, January 27th, in Room 309 on the 3rd Floor of the Ostlund Building, 2825 3rd Ave N, Billings, MT 59101.

3. Timeline

Event	Date/Time
Publication Dates for RFQ	Friday, November 14 th , 2025 Friday, November 21 st , 2025
Mandatory Pre-Submittal Meeting	Tuesday, Wednesday, December 3 rd , 2025, at 11:00 AM
Deadline for Submittals	Monday, January 26 th , 2026 by 3:00 PM
Submittal Opening	Tuesday, January 27 th , 2026, at 9:00 AM
Notice of Intent to Award Posting	TBD
Notice of Award/Contract Negotiations Begin	TBD

Yellowstone County reserves the right to modify the above timeline as needed.

4. Submission Content Requirements

Submittals shall include, at minimum, the following information:

- The firm's legal name, address, telephone number and contact person.
- The principal(s) of the firm and their experience and qualifications.
- The experience and qualifications of staff and outside consultants assigned to Yellowstone County policies.
- A description of the firm's prior experience with governmental insurance policies, governmental risk, worker's compensation, and Yellowstone County
- 3 – 5 References
- Provide an overview of your approach to strategic planning as it relates to ongoing plan performance.
- Outline your process for identifying services that would be recommended and implemented in a long-term insurance plan.
- A description of the firm's assigned staff capacity, experience in the field, and experience with county insurance and Yellowstone County operations.
- Availability of staff to respond to client requests.
- The firm's prior experience or other relevant factors the applicant deems relevant.

5. Selection Process & Scoring Criteria

A selection committee will be formed and review all timely submittals. The selection committee will use the following scoring criteria to evaluate submittals, for a total of **100 points** possible per committee member:

- Qualifications of the professional staff assigned to the project – **15pts**
- Capability to meet time/capacity requirements – **15pts**
- Location; ability to respond – **15pts**
- Strategic planning approach – **10pts**
- Experience – **20pts**
- Recent/Current work for Cities and Counties; familiarity with local conditions – **20pts**
- Overall quality of submittal – **5pts**

The selection committee may recommend an award based only on an evaluation of the written responses or decide to interview firms. If the committee decides to conduct interviews, the top three scoring firms will be contacted, and interviews will be scheduled.

The selection committee will recommend the award be made to the most qualified firm whose submittal is deemed most advantageous to the County. Unsuccessful firms will be notified after the BOCC approves the Notice of Intent to Award. The Board reserves the right to reject any or all submittals received, to waive informalities to evaluate the submittals, and to accept the submittal that best serves the interests of Yellowstone County.

6. Amendments to Solicitation

Any interpretation, correction, or addition of this request will be published on the County website at <https://www.yellowstonecountymt.gov/purchasing/>.

7. Contact Information & Questions

Any questions regarding the scope of services or submittal procedures should be submitted, in writing, to Matt Kessler, Purchasing Agent, at mkessler@yellowstonecountymt.gov.

All materials submitted in response to this RFQ become property of Yellowstone County. The Board of County Commissioners reserves the right to reject any or all proposals received, to waive informalities to evaluate the proposals submitted, and to accept the proposal that best serves the interests of Yellowstone County.

Done by the order of the Board of County Commissioners, Yellowstone County, Montana on this 12th day of November, 2025.

Board of County Commissioners
Yellowstone County, Montana

Mark Morse
Chair

Attest:

Jeff Martin
Clerk and Recorder