



# City of Ozark

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## *Re: Final Insurance Broker Candidates*

The City of Ozark published a Request for Qualification for Professional Insurance Brokers in late August of this year. After eight accredited insurance firms submitted proposals for the opportunity, five firms went on to interview with staff and the Board of Aldermen last Monday evening, October 12<sup>th</sup>, at City Hall. Two firms were then selected as the final candidates for providing insurance services for the City of Ozark; *Ollis & Co. and Connell Insurance.*

The selection committee staff members continued due diligence this week by calling references of both insurance providers, conducting extensive phone conferences/meetings with questions and answers, and began their final conclusions for preparing this staff recommendation to the Board of Aldermen.

Both Ollis & Co. and Connell Insurance executed well proposals, interviews, and are highly qualified. However, after much deliberation the final staff recommendation is as follows:

*The selection committee staff recommendation is to award Connell Insurance the bid for providing professional insurance services for the following reasons:*

- Progressive outlook on beginning a Disaster Recovery Plan for the City of Ozark.
- Provides Successful Seminars for Staff to attend with an average of over 100 attendees
- Strong history of municipal business
- Established Working Relationship and Trust
- Access to HR Management for Staff
- Access to I.T. services for Staff
- Access to Microsoft Training for Staff
- Allows City to Consolidate all Insurance Needs with a Single Agency

We thank both firms for their participation and patience.

*Selection Committee Staff Members*