

MEMORANDUM

April 14, 2026
M 1791 -CM
 CM/995-1434

TO: Dr. Jose L. Dotres, Superintendent of Schools

THROUGH: Ron Y. Steiger, Chief Financial Officer

FROM: Charisma Montfort, Chief Procurement Officer *CM*
 Procurement Management Services

SUBJECT: **SUPERINTENDENT'S EXTENSION OF CONTRACTS**

The following contracts are requested to be approved as Superintendent's Extension of Contracts, as authorized by School Board Policy 6320, Purchasing. It is the District's established practice, for Procurement Management Services to apply the contract amount for each approved extension, during the term of the contracts. There is no obligation to purchase any amount within the contract period as set forth in the bid solicitation. It is requested that you review and approve the extensions listed below:

Contract Number	Contract Title	Board Approval Date	# of Extensions Granted	Board Approved Contract Amount	Board Approved Term	# of Extensions Used	Total Contract Expenditures for Previous Period	New Total Contract Amount	New Contract Term	Reason for Contract Extension vs. Re-Bid
RFP-19-010-CM	Risk Management and Insurance Broker Services	May 19, 2021 October 19, 2022 (Correction)	1 2-year	N/A	5 Years	0	\$86,760,498 (3 Years and 7 Months)	N/A	May 19, 2026 — May 18, 2028 (Two Years)	Originating department has requested to utilize the first and only contract extension.

REVIEWED: *Jose Bueno*
 School Board Attorney

RECOMMENDED: *Ron Y. Steiger*
 Ron Y. Steiger, Chief Financial Officer

APPROVED: *Jose Bueno* **Jose Bueno**
 Dr. Jose L. Dotres **Designee**
 Superintendent of Schools **4/22/2026**

CM:dr

CONTRACT EXTENSION SUMMARY

Contract No.: RFP-19-010-CM

Contract Title: Risk Management and Insurance Broker Services

Board Meeting Date: May 19, 2021 Agenda Item: E-143
Correction Board Meeting Date: October 19, 2022 Agenda Item: E-145

Purpose of Contract: The purpose of this Request for Proposals (RFP) is to qualify and select a Risk Management and Insurance Broker of Record (broker).

Initial Award Amount: N/A

Initial Contract Award Period and Extension: May 19, 2021 through May 18, 2026
Five (5) years, with an option to extend for one (1) additional two (2) year period.

Required Licenses and/or Certifications: Yes, see attached. ☒ No ☐

Current Extension Amount: N/A

Current Extension Period: N/A

Recommended Extension Award Amount: N/A

Recommended Extension Period: May 19, 2026 through May 18, 2028
This is the first and only extension of the contract.
The awardee has agreed to extend for an additional two-year period, by letter on file.

Vendors Recommended for Contract Extension: One (1)
Arthur J. Gallagher Risk Management Services, LLC

Additional certified firms available: Yes, see attached. ☐ No ☒

OCPEBA Verified: Yes, see attached. ☒ No ☐

Cost Savings: Yes ☐ No ☒

Justification: It is considered to be in the best interest of the District to extend this contract for an additional two-year period, to benefit from fixed prices and continuity of service, inasmuch as the Consumer Price Index for All Urban Consumers (CPI-U), as of February 2026, indicated an increase of 0.3%. Staff has indicated satisfactory performance from the vendor(s) and recommends extension. This extension is based

on the terms and conditions contained in the original contract approved by the School Board.

Benchmark: N/A

Authorization to proceed with extension: ☒ Approved

☐ Denied

Buyer:

Diana F. Richardson

Diana Richardson, Procurement Agent

Charisma Montfort

By:

Charisma Montfort, Chief Procurement Officer

March 16, 2026

Date:

4/14/2026

Date: