



## REQUEST FOR PROPOSAL

Service/Goods: Insurance Broker Services    Staff Contact: David Leone  
Issue Date: March 11, 2022    Email: dleone@kcia.us  
RFP #: BROKER2022    CC: bballou@kcia.us

RETURN PROPOSAL NO LATER THAN: April 15, 2022  
RETURN PROPOSAL TO: KC International Academy  
Attn: David Leone  
414 Wallace Ave.  
Kansas City, Mo. 64125  
Re: RFP # BROKER2022, Insurance Broker Services

The Proposer hereby declares understanding, agreement and certification of compliance to provide the items and/or services, at the price quoted, in accordance with all terms, conditions, requirements and specifications of the original Request for Proposal ("RFP"), as modified by and addenda.

\_\_\_\_\_  
Authorized Signature    Dated:\_\_\_\_\_

Printed Name:\_\_\_\_\_ Title:\_\_\_\_\_

Company Name:\_\_\_\_\_

Address:\_\_\_\_\_

Phone:\_\_\_\_\_ Email:\_\_\_\_\_

Fax:\_\_\_\_\_

## **INSTRUCTIONS TO PROPOSER**

A request for proposals will be received by KC International Academy ("KCIA") until: **2:00 P.M., Friday, April 15, 2022** in accordance with the specifications and needs as described herein.

Proposals must be in sealed envelopes, marked plainly and prominently:

**Proposal for Insurance Broker Services RFP #BROKER2022**

Proposals must be addressed/delivered to:

KC International Academy  
Attn: David Leone  
414 Wallace Ave  
Kansas City, MO 64125

Faxed or emailed bids will not be accepted.

Award of this bid is planned for April 26, 2022.

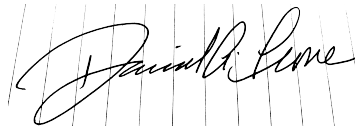
This RFP will be referred to as Exhibit A in the contract.

KCIA reserves the right to reject any and all proposals and to waive any "informalities" in the proposals received whenever such selection, rejection or waiver is in its best interest.

The KCIA Board shall negotiate a contract with the successful Proposer

All bid documents become public record once a negotiated contract has been executed.

All bids must be valid for a period of ninety (90) days from the opening of bids.



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David Leone  
Superintendent  
March 11, 2022

**Issue Date: March 11, 2022**  
**Questions Due to KCIA: April 1, 2022**  
**Return Date & Time: April 15, 2022, 2:00pm**

All timely proposals submitted to KC International Academy office **will** be considered for evaluation. **Proposals received after April 15, 2022 will not be accepted and will be returned to the vendor unopened.**

### **GENERAL TERMS & CONDITIONS**

- 1) KC International Academy ("KCIA") will receive sealed Proposals from qualified companies for providing **Insurance Broker Services** for the 2022-2022 fiscal year, with options to renew for fiscal years 2023-2024 and 2024-2025.
- 2) The purpose of this Request for Proposal ("RFP") is to establish the requirements for Insurance Broker Services, and to solicit Proposals from qualified companies for providing such Insurance Broker Services. The responding qualified company is hereafter referred to as the "Company". The RFP requests detail in order to avoid delays, misunderstanding, and to simplify the evaluation of the Proposals. The Company is requested to respond to each specification.
- 3) The Company must submit a complete Proposal covering all requirements identified in this RFP package in order to be considered. All Proposals will be carefully scrutinized to ensure that such requirements can be met. Proposals submitted must be the original work product of the Company.
- 4) The Company must submit three (3) copies of the Proposal and a single electronic copy of the entire response as a PDF document on a USB flash drive. Proposals shall be delivered in a sealed envelope clearly marked as indicated below.

#### **KC International Academy**

Attn: David Leone  
414 Wallace Ave.

Kansas City, Mo. 64125

Re: RFP # BROKER2022, Insurance Broker Services

- 5) Proposals must contain a manual signature of an authorized agent of Company in the space provided on the proposal forms. If the Company's authorized agent fails to sign and return the proposal form its proposal may be deemed non-responsive and not considered.
- 6) Proposals will be received until April 15, 2022. Facsimile and proposals sent as email attachments will not be considered in response to this RFP, nor will modifications by electronic or facsimile notice be accepted.
- 7) The time and date recorded by KCIA shall be the official time of receipt. KCIA is not responsible for lateness or non-delivery by the U.S. Postal Service or other carrier to KCIA.
- 8) Proposals may be modified or withdrawn by written notice or in person by the Company or its authorized representative, provided its identity is disclosed on the envelope containing the Proposal and such person signs a receipt for the Proposal, but only if the withdrawal is made prior to the deadline.

- 9) The information presented in the RFP is not to be construed as a commitment of any kind on the part of KCIA. There is no expressed or implied obligation for KCIA to reimburse responding firms for any expenses incurred in preparing Proposals in response to this request.
- 10) All Proposals must be submitted on KCIA's forms as attached with this specification. Proposals submitted on forms other than the enclosed may be rejected. No alternate Proposals that significantly deviate or modify the concept and ultimate objectives of this Proposal will be considered. Noncompliance with RFP specifications will disqualify Proposals from further consideration.
- 11) Any explanation or statement that the Company wishes to make must be contained with the Proposal but shall be written separately and independently of and attached to the Proposal. Unless the Company indicates, Company agrees that its proposal is in strict accordance with the RFP terms and requirements.
- 12) KCIA reserves the right to reject any or all Proposals and to waive informalities and minor irregularities in Proposals received. KCIA, in its sole discretion, will determine whether an irregularity is minor.
- 13) KCIA reserves the right to decline any or all Proposal submissions, or to cancel the RFP call, in whole or in part, at any time prior to making an award, for any reason, or no reason, without liability being incurred by KCIA to any Company for any expense, cost, loss or damage incurred or suffered by the Company as a result of such withdrawal.
- 14) All Proposals shall be deemed final, conclusive and irrevocable and no Proposal shall be subject to correction or amendment for any error or miscalculation. No Proposal shall be withdrawn without the consent of KCIA after the scheduled closing time for the receipt of Proposals.
- 15) Proposals, prices, terms and conditions shall remain firm for a period of ninety (90) days from the due date for Proposals.
- 16) The information contained herein is provided solely as a guideline for proposers. The information is not guaranteed or warranted to be accurate by KCIA, nor is it necessarily comprehensive or exhaustive. Nothing in this REP document is intended to relieve proposers from forming their own opinions and conclusions in respect to the matters addressed in this RFP document.
- 17) The Company is responsible for its own verification of all information provided to it. The Company must satisfy itself, upon examination of this RFP, as to the intent of the specifications. After the submission of the Proposal, no complaint or claim that there was any misunderstanding will be entertained. The Company agrees that it will make no claim for additional payment or seek an extension of time for completion of the work or seek any other concession because of any misinterpretation or misunderstanding of the RFP, or of any failure to fully acquaint itself with all conditions relating to the proposed work.
- 18) No oral interpretation will be made to any Company as to the meaning of the RFP. Any oral communication will be considered unofficial and non-binding on KCIA. Unauthorized contact by the Company with other KCIA employees or Board members regarding the RFP may result in disqualification.
- 19) By submitting a Proposal, Company certifies that the Proposal is made without previous understanding, agreement, or connection, either with any person(s), firm(s), corporation(s) or entity(ies) offering the same items, or with KCIA; and that the Proposal is in all respects fair, without outside control, collusion, fraud or otherwise illegal.
- 20) Requests for interpretation must be made in writing to David Leone, of KCIA, no later than April 1, 2022. Any information given to a Company concerning the RFP will be furnished to

all Companies as an addendum to the RFP if, in KCIA's sole discretion, such information is deemed necessary to all Companies in submitting Proposals on the RFP, or the lack of such information would be prejudicial to uninformed Companies. The Company should rely only on written statements issued by KCIA in the form of an addendum to the RFP.

- 21) KCIA reserves the right to modify the specifications prior to the Proposal submission deadline and will endeavor to notify all potential Companies that have received a copy of the specifications, but failure to notify shall impose no obligation or liability on KCIA.
- 22) Due regard will be given for the protection of proprietary information contained in all Proposals received. However, vendors should be aware that all materials associated with the procurement are subject to the terms of the Missouri Sunshine Law and all rules, regulations and interpretations resulting therefrom. RSMo § 610.021 states "Except to the extent disclosure is otherwise required by law, a public governmental body is authorized to close meetings, records and votes, to the extent they relate to the following . . . Sealed bids and related documents, until the bids are opened; and sealed proposals and related documents or any documents related to a negotiated contract until a contract is executed, or all proposals are rejected".
- 23) The Company shall not, under penalty of law and immediate disqualification of the Proposal, offer or give any gratuities, favors or anything of monetary value to an officer, employee, agent, or Board member of KCIA for the purpose of influencing favorable disposition toward a submitted Proposal or for any reason while a Proposal is pending or during the evaluation process.
- 24) No Company shall engage in any activity or practice, by itself or with other Companies, the result of which may be to restrict or eliminate competition or otherwise restrain trade. Violation of this instruction will result in immediate rejection of the Company's Proposal.
- 25) KCIA may accept one part, aspect or phase, or any combination thereof, of any Proposal unless the Company specifically qualifies its offer by stating that the Proposal must be taken as a whole.
- 26) KCIA reserves the right to consider historic data, facts and information, whether gained from Company's proposal, question and answer conference, references, or any other source.
- 27) KCIA may award a contract based upon the initial Proposals received without discussion of such Proposals. Accordingly, each initial Proposal should be submitted with the most favorable price and service standpoint.
- 28) To facilitate consideration of the Proposals, KCIA may, at its option, conduct interviews after receipt of the Proposal. If this is necessary, the Company will be contacted to arrange a time for an interview.
- 29) KCIA reserves the right to hold negotiations in an attempt to clarify and qualify terms of any Proposal.
- 30) KCIA reserves the right to negotiate final contract terms with any Company, regardless of whether such Company was interviewed or submitted a best and final Proposal.
- 31) KCIA may accept any Proposal as submitted whether negotiations have been conducted between the parties.
- 32) Neither the commencement nor cessation of negotiations shall constitute rejection of the Proposal or a counteroffer on the part of KCIA.
- 33) KCIA reserves the right to withdraw the award to a successful Company within 30 days of the award if, in the opinion of KCIA, the successful Company is unable or unwilling to enter into a form of contract satisfactory to KCIA. KCIA shall be entitled to do so without any liability being incurred by KCIA to the Company.

- 34) In the event of a conflict between the Proposal and the RFP, KCIA shall resolve any inconsistency in favor of the RFP. Additionally, KCIA shall in good faith decide all inconsistencies and/or disputes pertaining to the RFP and the Proposal. The Company agrees to abide by the decisions of KCIA. Any ambiguity in the Proposal because of omission, error, lack of clarity or noncompliance by the Company with specifications, instructions and all conditions of bidding shall be construed in the favor of KCIA.
- 35) If variances or conflicts between the General Terms and Conditions and the Special Conditions and Specifications outlined in the RFP exist, the Special Conditions and Specification prevail.
- 36) All of the terms and conditions of this RFP are deemed to be accepted by the Company and incorporated into the Company's Proposal submission. The terms and conditions stated in this RFP and the successful Company's response to this RFP shall be incorporated into a final Agreement between KCIA and the successful Company. Any conflict in the wording between the final Agreement and the wording of the terms and conditions of this RFP and the response of the Company shall be resolved in favor of KCIA and shall be deemed to be incorporated into the final Agreement.
- 37) The successful Company must not at any time assign any portion of its contract with KCIA nor shall it assign the contract without the written permission of KCIA. The successful Company must not, at any time, change sub-consultants approved by KCIA without written permission of KCIA, other than as listed in the bid submission.
- 38) KCIA reserves the right to terminate any contract within 30 days written notice if, in its opinion, the successful Company fails to meet the terms and conditions of the RFP. Notwithstanding the termination of the contract, the successful Company shall remain responsible for its obligations under the contract up to the date of termination. KCIA reserves the right to commence an action in a court of competent jurisdiction against the successful Company for damages that result from the breach of the terms and conditions of the contract, by the successful Company.
- 39) KCIA may terminate the Agreement immediately without further cost or liability in the event of the occurrence of any of the following: insolvency of successful Company; liquidation or dissolution of successful Company; the institution of any voluntary or involuntary bankruptcy proceeding by or against the successful Company; assignment by successful Company for the benefit of creditors; or the appointment of a receiver or trustee to manage the property of the successful Company.
- 40) In the event the Board of KCIA fails to approve the appropriation of funds sufficient to provide for KCIA's obligations under the Agreement, or if the funds are not appropriated due to federal, state or local action, KCIA shall have the right to terminate the Agreement by providing written notice to the successful Company and KCIA will thereby be relieved from all further obligations under the Agreement.
- 41) Initial Proposals may not be withdrawn for 90 calendar days from the due date for Proposals except with the express written consent of KCIA.
- 42) In the event the Agreement initially awarded by KCIA is terminated for any reason within 120 days of the due date for Proposals, KCIA reserves the right to negotiate and accept any other submitted Proposal.
- 43) KCIA shall not be responsible for any pre-Agreement expenses of any Company, including the successful Company, incurred prior to the commencement of the Agreement.

- 44) Although KCIA cannot bind future governing bodies, it is anticipated that the Company selected to serve as KCIA's Insurance Broker Services provider will be retained for a 1-year period with the option to renew fiscal years 2023-2024 and 2024-2025 after annual evaluations of services.
- 45) **UNDUE INFLUENCE:** In order to ensure the integrity of the selection process, Company's officers, employees, agents or other representatives shall not lobby or attempt to influence a vote or recommendation related to the Company's response, directly or indirectly, through any contact with school board members or other KCIA officials from the date this solicitation is released until the award of a contract by the KCIA Board of Directors.
- 46) **GRATUITIES:** KCIA may, by written notice to the Company, cancel this contract without liability to KCIA if it is determined by KCIA that gratuities, in the form of entertainment, gifts, or otherwise, were offered or given by the Company, or any agent or representative of the Company, to any officer or employee of KCIA with a view toward securing a contract or securing favorable treatment with respect to the awarding or amending, or the making of any determinations with respect to the performing of such a contract. In the event this contract is cancelled by KCIA pursuant to this provision, KCIA shall be entitled, in addition to any other rights and remedies, to recover or withhold the amount of the cost incurred by the Company in providing such gratuities.
- 47) Any agreement resulting from this RFP shall be governed by, construed and enforced in accordance with the laws of the State of Missouri without regard to the conflicts or choice of law principles thereof. The parties irrevocably consent to the jurisdiction of the State of Missouri, and agree that any court of competent jurisdiction sitting in the County of Jackson, State of Missouri, shall be an appropriate and convenient place of venue, and shall be the sole and exclusive place of venue, to resolve any dispute with respect to the Agreement.

## KC INTERNATIONAL ACADEMY INFORMATION

KCIA is a single facility charter school, operating an elementary school. Currently, KCIA averages approximately 670 students. KCIA currently employs approximately 125 full time staff and employees. Currently, KCIA has the following insurance policies:

- Employee Medical
- Employee Vision
- Employee Dental
- Employee Life and Accidental Death and Disability
- General Liability
- Workers' Compensation/Employer's Liability
- Property/Inland Marine
- Umbrella
- Automobile
- Crime
- School Leaders E&O/EPL
- Cyber

KCIA current Insurance Broker Services program's renewal date is August 1 for employee benefits and July 1 for business insurance.

## **Qualifications**

Proposals will be accepted from firms with demonstrated experience and competency in Missouri school district/charter school Insurance Broker Services. The minimum qualifications for companies submitting proposals are:

- 1) The Company must have demonstrated efforts to keep its staff current in the industry and in public/charter school organizations.
- 2) The Company must provide the names, titles, addresses, and phone numbers of at least two school district/charter school clients for whom the Company has provided similar Insurance Broker Services within the last two years similar in scope and reporting requirements as those required by KCIA.
- 3) The Company must have an existing similar engagement with at least two other school Districts.
- 4) The Company must be able to demonstrate that it does not have a record of substandard work. The Proposal must disclose any enforcement action to which the Company has been subject during the past three years or which is currently in progress.
- 5) The Company must be licensed in Missouri and in full compliance with all applicable local, state and Federal rules, regulations and laws.
- 6) Registration with Missouri Secretary of State: Contract Awards are contingent upon the Company providing KCIA, prior to the execution of the contract and each annual renewal, a current Annual Registration Report from the Missouri Secretary of the State's Office, showing Company is in good standing to conduct business in Missouri.

## Scope of Services

- 1) KCIA seeks insurance broker services.
- 2) The provider will have local representation and access to local claims offices and loss control services.
- 3) The provider will be designated as Broker of Record for the coverages noted herein.
- 4) Provider will solicit and negotiate renewals of existing scope of coverages and seek alternative solutions to the various loss exposures.
- 5) Provider will provide services on a fee basis.
- 6) All premiums quoted will be net of commissions.
- 7) Proposed fees will include “not to exceed” amounts.
- 8) Basic and optional coverages may be packaged/combined or sold separately.
- 9) Administration Functions/Serviceing
- 10) Trouble shooting
- 11) Process evaluation
- 12) Process improvement/enhancement
- 13) Form/Documentation Services and Control
- 14) KCIA makes no guarantee or any assurance as to the number of staff/employees who will be or become insured.
- 15) All data pertaining to KCIA shall be the property of KCIA.
- 16) Company will indemnify and hold harmless KCIA, its board, officers, employees and agents from every claim, demand, injury and/or damage which may be made by reason of injury, damage or harm to any person(s) and/or property caused or contributed to by the act, neglect, default and/or omission of Company.
- 17) The agreement may be terminated for cause, upon giving 30 days advance written notice. Cause shall include, but not be limited to, material breach of contract, consistent failure to timely perform, student endangerment, failure to maintain required insurance, *etc.*
- 18) The Company shall keep KCIA apprised of any and all changes in operations or reporting requirements and shall serve as a resource and be available for consultation on accounting and internal control issues throughout the fiscal year.
- 19) The selected Company will maintain regular contacts and meetings with KCIA administrators and other personnel including but not limited to:
  - a) Engagement planning meeting
  - b) Progress reports
  - c) Closing review meeting
  - d) Changes that would affect the reporting requirements of the school district/charter school
  - e) Sharing of innovative methods and procedures that may warrant KCIA investigation and/or consideration
  - f) Newsletters or other method of regular communications containing information with specific benefit to school districts/charter schools

- 20) No part of the Insurance Broker Services may be subcontracted, transferred, or assigned, by operation of law or otherwise, without KCIA's prior, express written consent.
- 21) Any cost or expense, including reasonable attorney fees, incurred by KCIA to enforce the contract shall be borne by Company.

## **RFP Evaluation Criteria**

Each Proposal will be reviewed and evaluated by KCIA staff members. The areas assessed will include, but not be limited to:

1. Prior insurance broker experience
  - a. Missouri public school districts
  - b. Missouri charter school districts
  - c. Entities of similar nature and size
2. Organization, size and structure of firm
3. Qualifications of staff to be assigned to program
4. Overall supervision to be exercised by the Company's management
5. The Company's understanding of the work
6. Costs
  - a. short term
  - b. potential long term
  - c. employee costs
  - d. KCIA costs
7. Performance/teaming enhancement program
8. Benefits compared to current program
9. Administration – proven efficient, reliable, consistent and fair administration of claims.  
Technology regarding premium receipt, employee information
10. Technical compliance
11. Nature and extent of proposed efficiency improvements
12. Nature and extent of benefit improvements
13. Reliable, consistent and fair administration of claims
14. The overall best benefit program with the most effective price.
15. Familiarity with ERISA

KCIA may conduct interviews with selected firms in connection with its evaluation of the Proposals.

The contract will be awarded to the Company whose offer conforms to the RFP and is determined to be most advantageous to KCIA, price and other factors considered. KCIA reserves the right to act as sole and undisputed judge of what is most advantageous to KCIA.

## Attachments

It is the purpose of this RFP to obtain as complete a set of data as possible from each Company. This will enable KCIA to determine which Company is best able to meet all of the criteria which are to be considered in the award of Insurance Broker Services.

### Proposal Format & Contents

The Company's proposal package shall contain the following items in the order listed below and utilize the forms provided in the Attachment Section of the RFP. The Company is urged to be concise yet thorough in its presentations. Pertinent supplemental information should be referenced and included as attachments. All Proposals must be organized to comply with the following sections:

- 1) The Proposal shall include a **Letter of Transmittal** that provides an introduction to the Company and includes an expression of the Company's ability and desire to meet the requirements of the RFP. The Letter of Transmittal must be signed by an authorized individual able to bind the Company to all items in the Proposal including products, services, prices, *etc.* contained in the Proposal and include their title, addresses and phone number(s).
- 2) The Proposal shall include an **Executive Summary** that briefly describes the Company's approach to meeting KCIA's requirements as outlined in the **RFP**, indicates any major requirements that cannot be met, and highlights the major features of the Proposal. The reader should be able to determine generally how well the Proposal meets KCIA's requirements by reading the Executive Summary.
- 3) **Attachment 1: Company Identification Form**
  - a) This cover sheet identifies the Company's name, mailing address, telephone, fax, and contact person(s). The Company Identification Form must be signed by an officer of the Company.
- 4) **Attachment 2: References and Experience**
  - a) Each Company must submit a minimum of four (4) references, two (2) of which must be Missouri public schools/charter schools. Each reference must be presently using services similar to those requested in this RFP. No reference may be an affiliate of the Company or the Company's officers, directors, shareholders or partners.
- 5) **Attachment 3: Company Résumé and Personnel Commitment**
  - a) The Company shall complete the Company Résumé and Personnel Commitment Form, indicating the personnel it anticipates will work on Insurance Broker Services program for KCIA.
  - b) Provide an organization chart showing staffing and lines of authority for key personnel assigned. Include a basic description for each job classification.
- 6) **Attachment 4: Proposed Product and Price**
  - a) The Company shall indicate the proposed product(s) and cost(s) for providing Insurance Broker Services by completing the Proposed Price Form. A separate

form shall be completed for the initial year plus the additional 2 years of renewal of the Proposal.

b) The Company shall indicate its willingness to provide final renewal rates 180 days in advance. If not, what is the period which it will provide rates?

c) The Company shall indicate:

- ☐ Address from which the account will be handled.
- ☐ Size of firm including number of employees and locations.
- ☐ Industry experience.
- ☐ Percentage of commercial vs. personal lines of coverage written.
- ☐ Total property and commercial premiums placed annually by Company.
- ☐ List top 5 commercial insurers with whom Company places coverages.
- ☐ List number of Missouri educational entity accounts Company services locally on a direct basis.
- ☐ List number of Missouri charter school accounts Company services locally on a direct basis.
- ☐ List the top 5 insurance companies you would approach for each insurance line (in order of preference) to seek alternatives to KCIA's current coverages.
  - i. Does Company currently have any educational accounts with each?
  - ii. Will access be direct or via a broker or wholesaler?
  - iii. If the requested insurer does not offer a multi-line "package" program, note the applicable line(s) of coverage.
- ☐ Does Company have access to non-traditional markets, e.g. association programs, endorsed trusts/pools, etc.?
- ☐ Describe Company's programs to assist in loss reduction by KCIA.
- ☐ What do you believe KCIA's greatest 1 year and 5 year risk management exposures are?
- ☐ List all anticipated commissions that Company anticipates receiving that would be directly tied to KCIA.
- ☐ List ancillary risk management services available. If additional associated fees, please list.
- ☐ Provide a proposed broker service agreement, subject to approval by KCIA.
- ☐ Confirm that KCIA will receive complete copies of all insuring agreements each policy term, including all applicable forms.

d) Please provide any relevant information that you believe is not adequately provided by Company's responses to the prior requests.

7) **Exhibit 5 Anti-Collusion Affidavit**

8) **Exhibit 6 Debarment and Suspension Certification**

9) **Exhibit 7 Affidavit of Non-Discrimination Employment**

Attachment 1: Company Identification Form

Designate one individual as the Company's representative to KCIA during the term of the contract. The representative will be contacted to solve any and all problems that may arise concerning the Proposal during the evaluation period. The undersigned Company hereby agrees to be bound by the terms of the RFP and that the enclosed Proposal is submitted in accordance therewith. Once completed and returned, this Proposal becomes the primary basis for evaluation and selection of the Company to provide the services required by KCIA for the specified period. By signing this Company Identification Form, the Company certifies that there are no "PARTIES OF INTEREST" or "CONFLICTS OF INTEREST", as defined by state and/or federal regulations, existing between the Company and KCIA or any of its employees, agents or Board of Education members.

Legal Name: \_\_\_\_\_  
Representative's Name: \_\_\_\_\_ Title: \_\_\_\_\_  
Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
E-mail Address: \_\_\_\_\_  
Years in Operation: \_\_\_\_\_ Years under current structure and/or under previous structure \_\_\_\_\_

Name of Company's Officers:	Title
_____	_____
_____	_____
_____	_____
_____	_____

Official written statements and addendums will be posted on KC International Academy website at [www.kcia.us](http://www.kcia.us).

The undersigned hereby acknowledges that the Company has read and agrees to the terms and conditions set forth in the RFP, and that the terms and conditions set forth in the Proposal will remain open for at least 90 days from the deadline for submission of Proposals.

**Company Officer's Name:** \_\_\_\_\_

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

## Attachment 2: References and Experience

Each Company must submit a minimum of four (4) references. Two (2) of these references must be from a Missouri public school/charter school. Each reference must be presently using services similar to those requested in this RFP. No reference may be an affiliate of the Company or the Company's officers, directors, shareholders or partners. List as primary references any contracts currently in force with public school districts; include contacts and telephone number(s) for each reference. Use additional pages for additional contracts.

MO Public/Charter School:

Business Address:

Name and Title of Contact:

Phone Number of Contact:

Contract Length:

Contract Value:

MO Public/Charter School:

Business Address:

Name and Title of Contact:

Phone Number of Contact:

Contract Length:

Contract Value:

MO Public/Charter School:

Business Address:

Name and Title of Contact:

Phone Number of Contact:

Contract Length:

Contract Value:

Company Name:

Business Address:

Name and Title of Contact:

Phone Number of Contact:

Contract Length:

Contract Value:

Company Name:

Business Address:

Name and Title of Contact:

Phone Number of Contact:

Contract Length:

Contract Value:

All Contracts terminated for default within the last five (5) years should be noted below. Termination for default is defined as notice to stop performance due to Company's nonperformance or poor performance. Submit full details of all terminations for default experienced. KCIA will evaluate the facts and may at its sole discretion reject the Company's Proposal if the facts discovered indicate that the completion of a contract resulting from this RFP may be jeopardized by selection of the Company. If the Company has experienced no such terminations for default in the past five (5) years, so indicate.

**Terminated Contracts within the Last Five (5) Years**

	#1	#2	#3
Company Name			
Business Address			
Name of Contact			
Telephone Number of Contact			
Contract Length			
Contract Value			

**In addition, please include Company's most recent peer review report and any letters of comment.**

Attachment 3: Company Résumé and Personnel Commitment

*Part A - Resume*

- 1) Name of Company:
- 2) Local Office Location:
- 3) Year Company was Established:
- 4) State whether the Company is local, national or international:
- 5) State whether the Company is currently licensed to do business in the State of Missouri:
- 6) Number of Personnel Employed by the Company at the Local Office Identified Above:

	<b>TOTAL</b>
<b>a. Partner/Owner</b>	
<b>b. Manager</b>	
<b>c. Supervisors</b>	
<b>d. Assistants</b>	
<b>e. Others</b>	
<b>Total Full Time Professional Staff</b>	

- 7) Type of Insurance Broker Services Provided by the Company: (Provide Approximate Percentage):

<b>School School Districts</b>	
<b>Charter School Districts</b>	
<b>Similar Institutions</b>	

*Part A - Personnel Commitment*

8) Number and level of personnel, and percent of time which would be committed to this engagement:

	Number	Percentage of Proposed time Dedicated to This Engagement
a. Partner/Owner		
b. Manager		
c. Supervisors		
d. Others		
TOTAL		

9) On separate sheets, provide the résumés of management/supervisory personnel who would be committed to this engagement. The Company should also provide information on the Insurance Broker Services experience of each person, including information on relevant continuing professional education for the past three years and membership in professional organizations relevant to the performance of the requested services. Please note that the Manager and Supervisor should be committed to the engagement for its duration, including option years, subject to normal promotion and attrition.

### Attachment 3: Company Résumé and Personnel Commitment

#### Part b)

Provide an organization chart showing staffing and lines of authority for key personnel assigned. Include a basic description for each job classification.

Attachment 4: Proposed Product and Price

*Part a)*

*FY2022-2023*

Indicate the proposed product(s) and cost(s) for providing Insurance Broker Services:

Attachment 4: Proposed Product and Price

*Part a)*

*FY2023-2024*

Indicate the proposed product(s) and cost(s) for providing Insurance Broker Services:

Attachment 4: Proposed Product and Price

*Part a)*

*FY2024-2025*

Indicate the proposed product(s) and cost(s) for providing Insurance Broker Services:

#### Attachment 4: Proposed Product and Price

##### *Part b)*

Indicate your willingness to provide final renewal rates 180 days in advance. If not, what is the period which it will provide rates?

## Attachment 4: Proposed Product and Price

*Part c)*

- ☐ Address from which the account will be handled.
- ☐ Size of firm including number of employees and locations.
- ☐ Industry experience.
- ☐ Percentage of commercial vs. personal lines of coverage written.
- ☐ Total property and commercial premiums placed annually by Company.
- ☐ List top 5 commercial insurers with whom Company places coverages.

☐ List number of Missouri educational entity accounts Company services locally on a direct basis.

☐ List number of Missouri charter school accounts Company services locally on a direct basis.

☐ List the top 5 insurance companies you would approach for each insurance line (in order of preference) to seek alternatives to KCIA's current coverages.

i. Does Company currently have any educational accounts with each?

ii. Will access be direct or via a broker or wholesaler?

iii. If the requested insurer does not offer a multi-line "package" program, not the applicable line(s) of coverage.

- ☐ Does Company have access to non-traditional markets, e.g. association programs, endorsed trusts/pools, etc.?
  
  
  
  
  
  
  
  
  
  
- ☐ Describe Company's programs to assist in loss reduction by KCIA.
  
  
  
  
  
  
  
  
  
  
- ☐ What do you believe KCIA's greatest 1 year and 5 year risk management exposures are?
  
  
  
  
  
  
  
  
  
  
- ☐ List all anticipated commissions that Company anticipates receiving that would be directly tied to KCIA.
  
  
  
  
  
  
  
  
  
  
- ☐ List ancillary risk management services available. If additional associated fees, please list.

- ☐ Provide a proposed broker service agreement, subject to approval by KCIA.
  
  
  
  
  
  
  
  
  
  
- ☐ Confirm that KCIA will receive complete copies of all insuring agreements each policy term, including all applicable forms.

**EXHIBIT 5**

**ANTI-COLLUSION AFFIDAVIT**

STATE OF                    )  
                                      )  
COUNTY OF                )

\_\_\_\_\_, of lawful age, being first sworn on oath states that he/she is the agent authorized by the bidder to submit the attached bid. Affiant further states that the bidder has not been a party to any collusion among bidders in restraint of freedom of competition by agreement to bid at a fixed price or to refrain from bidding; or with any state official of employees to quantity, quality, or price in the prospective contract, or any other terms of said prospective official concerning exchange of money or other thing of value for special consideration in the letting of contract; that the bidder/contractor had not paid, given or donated, or agreed to pay, give or donate to any officer or employee either directly or indirectly in the procuring of the award of a contact pursuant to this bid.

\_\_\_\_\_  
Signed

Subscribed and sworn before me this \_\_\_\_ day of \_\_\_\_\_, 2022.

\_\_\_\_\_  
Notary Public (or Clerk or Judge)

My commission expires \_\_\_\_\_.

## Exhibit 6

### DEBARMENT AND SUSPENSION CERTIFICATION

This certification is required by the Federal Regulations Implementing Executive Order 12549, Debarment and Suspension, 45 CFR Part 93, Government-wide Debarment and Suspension, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85,668,682), Department of Health and Human Services (45 CFR Part 76).

The undersigned certifies, to the best of his or her knowledge and belief, that both the undersigned and the undersigned's principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency;
2. Have not within a three-year period preceding this contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or Local) transaction or contract under a public transaction, violation of federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false statements, or receiving stolen property;
3. Are not presently indicted for or otherwise criminally or civilly charged by a government entity with commission of any of the offense enumerated in Paragraph (2) of this certification; and
4. Have not within a three-year period preceding this contract had one or more public transactions terminated for cause or default.

(Where the prospective recipient of federal assistance funds is unable to certify to any of the statements in this certification, such prospective recipient shall attach an explanation to this certification form.)

Name of Organization/Firm: \_\_\_\_\_

Signature of Authorized Representative: \_\_\_\_\_

**Exhibit 7****Affidavit of Non-Discriminatory Employment**

This company, Contractor, or Subcontractor agrees to refrain from discrimination in terms and conditions of employment on the basis of race, color, religion, sex, or national origin, and agrees to take affirmative action to the extent required by federal statutes and rules and regulations issued pursuant thereto in order to maintain and ensure non-discriminatory employment practices.

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Signature

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Printed Name

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Title

ADDENDUM I

**KC INTERNATIONAL ACADEMY INSURANCE BROKER SERVICES RFP #BROKER2022**

These are KC International Academy's responses to questions regarding the Insurance Broker Services proposals.

1.