



American Indian Model Schools

171 12th Street
Oakland, CA 94607-4900
510.893.8701
www.aimschools.org

REQUEST FOR PROPOSAL
FOR AN INSURANCE BROKER

MARCH 20, 2018

American Indian Model School (AIMS) is a public charter school within the Oakland Unified School District serving student from grade K-12. The school operates two (2) elementary schools and one (1) high school. The school operates under a Board of Directors who have authority over the governance of the schools.

American Indian Model School (AIMS) is requesting proposals from qualified proposers to serve as an Insurance Broker for their three (3) charter schools consisting of American Indian Public Charter School, American Indian Public Charter School II, and American Indian Public High School.

Proposals are due no later than 4:00 P.M. Pacific Time, Monday, April 16, 2018 to the Finance Office, American Indian Model School, 171 12th Street, Oakland, CA 94607. Proposals will be accepted by electronic media to the email address: finance@aimschools.org.

Proposer also certifies the it does not discriminate against any employee or applicant for employment on the grounds of race, age, color, national origin, religion, sex, gender, disability, genetic information, or any other classification protected by federal, California state constitutional, or statutory law; and does not and will not maintain or provide its employees any segregated facilities at any of its establishments.

American Indian Model School offers educational and employment opportunities without regard to race, age, color, national origin, religion, sex, gender, disability or genetic information.

COMPANY NAME

ADDRESS

PHONE

FAX

CITY

STATE

ZIP

E-MAIL ADDRESS

Names and signatures below certify that you understand and agree to all information in this Request for Proposal.

AUTHORIZED REPRESENTATIVE (Print)

Signature

Date

GENERAL CONDITIONS:

1. Proposals are due to the Finance Office, American Indian Model School, 171 12th Street, Oakland, CA 94607 no later than 4:00 P.M., Pacific Time, Monday, April 16th, 2018.
2. Initial contract period will run July 1, 2018 to June 31, 2019 with the option to extend annually for up to four (4) additional consecutive one (1) year periods if agreeable to all parties.
3. Proposals should provide a straightforward and concise presentation, adequate to satisfy the requirements of the Request for Proposal (RFP). Emphasis should be on completeness, clarity of contents and responsiveness to the RFP. Proposals should be structured to respond to the RFP specifications. Format of Request for Proposal response should be as follows:
 - a. Executive summary, company organization, primary contact for this proposal.
 - b. Provide a brief description of the history and organization of the firm and of any proposed subcontractor.
 - c. Describe your firm's internal organization and the way Services will be furnished. Provide an example of the structure of servicing a current account like American Indian Model School.
 - d. Must be licensed in the State of California. Copies of business licenses, professional certifications or other credentials, together with evidence that the firm and its principals are in good standing and qualified to conduct business in California. Proof of Errors and Omissions coverage is required.
 - e. Minimum of five (5) years in business as a firm.
 - f. Company background and qualifications referenced: Five (5) clients from whom you have currently provided comparable services for K-12 or higher education within the last two (2) to three (3) years. Please include contact name, address, telephone number, and email address.
 - g. A qualified principal with five (5) years' experience in commercial lines insurance brokerage in California.
 - h. Experience providing insurance brokerage services to Government entities in California.
 - i. Safety and Loss Control experience
 - j. Identify the account team structure your firm would use with American Indian Model school. List the names of the proposed account service team and describe each member's service role. Include at least two qualified individuals from your firm having a minimum of five years' experience. Provide the Number of full time employees.

- e. Presentations April 17, 2018
- f. Board Approval April 17, 2018
- g. Implementation April 18, 2018

- 8. The proposals will be evaluated, and a vendor selected using the following criteria:
 - a. Project Plan
 - b. Firm Experience, Qualifications, and Personnel
 - c. Cost
 - d. References related to K-12 Schools