



AIMS K-12 College Prep Charter District

American Indian Public Charter School II (K-8) 171 12th St | Oakland | CA 94607

E elementary@aimsk12.org
T 510-893-8701
F 510-893-0345

www.AIMSK12.org

AIMS College Prep Middle School 171 12th St | Oakland | CA 94607

E middleschool@aimsk12.org
T 510-893-8701
F 510-893-0345

AIMS College Prep High School 746 Grand Ave | Oakland | CA 94610

E highschool@aimsk12.org
T 510-220-5044
F 510-519-5549

REQUEST FOR PROPOSAL FOR AN INSURANCE BROKER

August 14, 2023

AIMS K12 College Prep (AIMS K12) is a public charter school district within the Oakland Unified School District serving student from grade K-12. The Charter District operates three Schools (1) Elementary school, (1) Middle School and one (1) High school. The schools operate under a Board of Directors who have authority over the governance of the schools.

AIMS K12 College Prep (AIMS K12) is requesting proposals from qualified proposers to serve as an Insurance Broker for their three (3) charter schools consisting of AIMS K12 College Prep Middle Charter School, AIMS K12 College Prep Elementary Charter School, and AIMS K12 College Prep High School.

Proposals are due no later than 4:00 P.M. Pacific Time, 08/24/2023 to the Business Operations Office, AIMS K12 College Prep, 171 12th Street, Oakland, CA 94607. Proposals will be accepted by electronic media to the email address: finance@aimsk12.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.

AIMS K12 College Prep 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

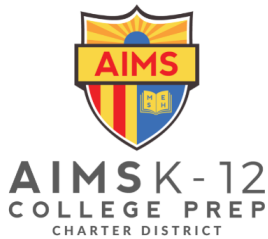
Names and signatures below certify that you understand and agree to all information in this Request for Proposal.

AUTHORIZED REPRESENTATIVE (Print)

Signature

Date

GENERAL CONDITIONS:



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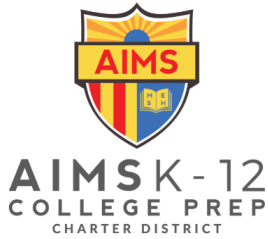
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1. Proposals are due to the Business Operations Office, American Indian Model School, 171 12th Street, Oakland, CA 94607 no later than 4:00 P.M., Pacific Time 08/17/2023
2. Initial contract period will run upon Board approval to June 30, 2024 with 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 AIMS K12 College Prep Schools.
 - 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 AIMS K12 College Prep District. 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.
 - k. Describe the steps you would take in reviewing the School's current insurance program and designing changes to the program. Include specific techniques and procedures your firm may use to assist in identifying current and anticipated new exposures to loss.
 - l. A detailed cost proposal, including any travel costs and other expenses. As the School may award a contract based on the initial offer, the initial offer should be made on the most favorable terms available. Include broker service compensation on the basis of, one (1) fee for service or two (2) commission. If compensation is commission based, provide detailed commission structure in the proposal.



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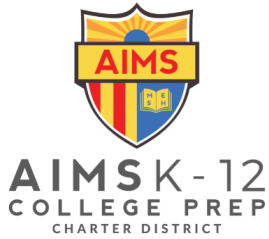
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- m. Emergency contact. 24-Hour Emergency Name and Telephone Number.
 - n. Must have an A.M. Best Rating of A- or better. If not A.M. Best, then a copy of most recent financial statement filed with the California Department of Insurance. It should include the most recent year's annual reports, or comparable document, including detailed current profit and loss, assets and liabilities, and other relevant data.
 - o. Proposal plan.
 - p. Support services and training. Provide the company name, address, telephone number, fax number and E-mail address of the branch that will directly serve the school.
 - q. Fee schedule
 - r. Completed and Signed Certificate of Non-Discrimination Form
 - s. Completed and Signed Request for Proposal Agreement
 - t. Exceptions
4. Insurance coverage for this request includes:
- a. Commercial Property and Liability
 - b. Umbrella/Excess Liability
 - c. General Liability
 - d. Commercial Crime
 - e. Automobile
 - f. Directors and Officers Legal Liability
 - g. Student Accident Liability
 - h. Volunteers Liability
 - i. Worker's Compensation
 - j. Employment Practices Liability
 - k. Cyber Security
 - l. Errors and Omissions
5. The Proposal should reflect a Comprehensive package for all the insurance coverage required and requested.
6. Proposer to submit five (5) complete hardcopy sets (original and 4 copies). Time, date and name of RFP must be clearly marked on face of sealed envelope. All price quotations and related materials must be in a sealed envelope. Same information required for email submission.
7. Estimated proposal timing:



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|----|------------------------|-------------|
| a. | RFP Issued | 08/14/2023 |
| b. | Deadline for Questions | 08/17/ 2023 |
| c. | RFP Due | 08/17/2023 |
| d. | RFP Evaluation Begins | 08/18/23 |
| e. | Presentations | 08/22/23 |
| f. | Board Approval | 08/22/23 |
| g. | Implementation | 09/1/23 |

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