

**PROPOSED INSURED:**

Hamilton R-2 School District  
419 S. Hughes Street  
Hamilton, MO 64644

**PROPOSED CONTACTS:**

Dr. Billie McGraw, Superintendent  
Katie Iddings, HR  
419 S. Hughes Street  
Hamilton, MO 64644  
Phone: 816-583-2134  
Email: [mcgraw@hamilton.k12.mo.us](mailto:mcgraw@hamilton.k12.mo.us)  
[iddings@hamilton.k12.mo.us](mailto:iddings@hamilton.k12.mo.us)

**PROPOSED CONTRACT PERIOD:**

**January 1, 2026 to June 30, 2026 or  
December 31, 2026**

**TARGET DATE FOR RECEIPT OF PROPOSAL:**

To be accepted, proposals must be in the district central office, 419 S. Hughes Street, Hamilton, MO 64644 **BY NO LATER THAN 12:00 pm, Monday, September 15, 2025.**

**Section:**

- |                                      |     |
|--------------------------------------|-----|
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| A) General Data                      | 3.  |
| B) Proposal Procedures               | 4.  |
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| Federal Work Authorization Addendum  | 11. |
| Federal Work Authorization Affidavit | 13. |
| General Conditions                   | 14. |

**The District reserves the right to accept or reject any or all proposals, and to waive any technicalities or irregularities in any proposal, and to make award to the response, which in the District's opinion is most advantageous to the District.**

## **PRELUDE**

The Hamilton R-II School District is seeking proposals for insurance brokerage services from brokers in the Hamilton, Missouri area. The Broker will need to have local representation including access to companies with local claims offices and loss control services.

The district will select a single broker who will receive a Broker of Record for the coverages noted. Coverages include, at minimum, employee medical, dental, vision, and basic life insurance. The selected Broker will be asked to negotiate a competitive renewal in addition to seeking alternatives to the current program. The broker agreement will be on a one-year basis, with up to two subsequent options for one-year extensions.

The District is requesting that broker services be proposed on a fee basis, with insurance premiums quoted net of disclosed commissions. Proposed contract period includes January 1, 2026 to June 30, 2026 or December 31, 2026.

For more information, please contact Dr. Billie McGraw at the district central office at 816-583-2134. Proposals must be submitted by 12:00 pm on Monday September 15, 2025 at Hamilton R-II Central Office, 419 S. Hughes Street, Hamilton MO 64644. The Broker of Record will be selected on September 17, 2025 during the School Board Meeting which begins at 6:30pm.

## **SECTION “A”**

### **GENERAL DATA**

Website: [www.hamilton.k12.mo.us](http://www.hamilton.k12.mo.us)

The mission of the Hamilton School District: “The Hamilton R-2 School District strives to inspire and challenge students to achieve their full potential.”

#### **Basic District Facts:**

- Students Enrollment (Preschool-12) 608
- Schools Total – 3 Schools: Hamilton Elementary School PK-5 (302), Hamilton Middle School 6-8 (132), Penney High School 9-12 (174)
- Hamilton R-2 School District serves the residents of Caldwell County and Daviess County. Located approximately 45 miles east of St. Joseph, the school district serves more than 600 students in preschool through 12th grade.

## **SECTION "B"**

### **PROPOSAL PROCEDURES**

ALL PARTICIPANTS MUST AGREE TO COMPLY WITH THE FOLLOWING:

- ALL questions are to be submitted via email to the attention of the Proposal Contact noted on Page 1 of these specifications.
- The District reserves the right to modify or cancel these specifications after issuance.
- Although use of the e-mail or facsimile is encouraged during the underwriting process, the actual Proposal received via e-mail or facsimile will NOT be acceptable. Proposals must be in hard copy.
- Information will become public record at the direction of the District.
- The District will not be responsible for any expenses incurred by a firm in preparing and submitting proposals.
- These specifications and proposal format have been specifically designed for the Hamilton R-II School District.
- Respondents will be prohibited from assigning, transferring, conveying, subletting or otherwise disposing of this proposal or any resultant agreement or its rights, title or interest therein or its power to execute such agreement to any other person, agent, broker, company or corporation without the previous written approval of the District.
- The District reserves its right to accept or reject any or all proposals or parts of proposals, or to waive irregularities and technicalities. Each proposer waives any claim against the District should the District fail to select their proposal.
- Proposals are to be delivered to the Hamilton R-II central office at 419 S. Hughes Street, Hamilton, MO 64644 no later than 12:00 pm on Monday, September 15, 2025. All proposals received after the deadline will NOT be considered.

## **SECTION "C"**

### **BROKER QUESTIONNAIRE**

The following Broker Questionnaire **MUST** be completed in its entirety and used as a supplement to your proposal.

It is critical that you briefly outline the insurance markets that you feel would be beneficial for the District to consider. Be sure to include your past relationship with these markets.

#### **GENERAL AGENCY INFORMATION**

1. List the address from which the District's account will be handled.
2. What is the size of your firm, i.e. number of employees / locations?
3. Web-site address.
4. Percentage of commercial vs. personal lines of coverage written.
5. Total property and casualty premiums placed annually by your firm.
6. List of top 5 commercial insurers with whom you place business.

#### **EDUCATIONAL ENTITY EXPERIENCE**

1. How many Missouri educational entity accounts does your firm's local office currently represent on a direct basis? Please include:
  - Contact individual; Phone number; Lines of coverage written; Years of service to that account; Size of the account (#schools / # students, etc.)
2. List same information for governmental entity accounts (preferably public schools handled by your local office) outside of Missouri.
3. **IMPORTANT!** List the top three to five insurance companies you would approach (in your order of preference) to seek alternatives to the District's current program. Include:
  - Will be accessed direct or via a broker or wholesaler?
  - Does your agency currently have any educational accounts with them?
  - If a requested insurer does not offer a multi-line "package" program, note the applicable line(s) of coverage.

## **SECTION "C" (Continued)**

### **QUESTIONNAIRE**

#### **EDUCATIONAL ENTITY EXPERIENCE (Continued)**

4. Describe your marketing strategy.
5. Provide examples of recent marketing efforts for similar governmental accounts including the number of proposals received and how the results compared to the expiring premium.
6. How would you approach a key market or proprietary program if you do not have a contract with that market and they typically do not utilize a broker?
7. What types of non-traditional markets do you represent or have access to that could be of benefit to the District, i.e., Association programs (either endorsed trusts/pools), etc.
8. Do members of your firm have a working knowledge of the Missouri Sovereign Immunity Statute as it relates to educational entities and insurance? Please provide details.
9. Describe your firm's ability to work with the District's Workers' Compensation claims handlers to ensure claims are being proactively handled.
10. Describe your firm's ability to reduce loss frequency and severity.
11. Identify up to three specific instances where your service has shown a benefit to a client (the client's identity need not be exposed).
12. Identify up to four unique incidents, claims, exposures or other risks which demonstrates your working knowledge relevant to similar public entity accounts (do not expose client's identity).

## **SECTION "C" (Continued)**

### **QUESTIONNAIRE**

#### **BROKER SERVICES**

1. List the service team that would be assigned to the District's account. Include their physical location and any experience they have with educational entity risks.
2. Outline services that would be included if selected as the exclusive broker of record – be specific and refer to the service requests outlined in this document. Note any risk management education or departmental presentations relative to the risk management resources available through your firm.
3. Identify any on-line claim reporting, auto certificates, safety newsletters available or any other technical bulletins.
4. Will you commit to a minimum of semi-annual meetings (which includes loss runs) with the District as well as providing a mid-year stewardship report of the current program along with market trends?
5. Identify any contingency commissions that could/would be earned by your firm with the incumbent insurers that can be directly tied to the District's premiums.
6. Disclose any business pursuit, either by the brokerage firm or principal that could present a possible conflict of interest (examples – security firm, land development, banking services, legal firm, auditing/accounting services, etc.)
7. Provide types of ancillary risk management services available from insurers or associations for a separate fee or if included in the quoted service fees.
8. Please submit a proposed broker service agreement. This contract will be subject to approval by the District.