SOLICITATION TITLE: RFP 23013-JD Insurance Broker Services

TYPE OF ADDENDUM:
☐ Change or clarification to the Solicitation’s specifications, requirements, or scope of work.
☒ Questions posed regarding the Solicitation and their respective answers by The Citadel.

Question: Will you please provide information about international curriculum and locations?

Spain, Valencia – Intensive summer language study for Spanish
Spain, Madrid – General studies semester program
Italy – General studies semester program
Greece – General Studies semester program and summer psychology program
France – Intensive summer language program for French, summer program for Leadership Studies and History
Estonia – Summer program for Intelligence and Security Studies, Political Science, and Criminal Justice, and non-academic program for Olmsted Scholars
Wales – International politics, Intelligence and Security Studies semester program
Panama – Biology summer intensive program
Belize – Biology summer intensive program
Kenya – Summer program for nursing and pre-professional academic programs
Germany – Semester exchange program in general studies, summer intensive program for German language, and History summer program
The Netherlands – Cultural exchange program, non-academic
Czech Republic – Political Science summer program
Georgia – Intelligence and Security Studies summer program
Cyprus – General Studies semester program
England – General studies and internship semester program
Thailand – General studies semester program
Belgium – History summer program
Taiwan – Mandarin language summer intensive program (Department of Defense Project GO program)
South Korea – General studies semester program

Question: To which countries do you sponsor study abroad programs?

Spain
Italy
Greece
France
Estonia
Wales
Panama
Belize
Kenya
Germany
The Netherlands
Czech Republic
Georgia
Cyprus
England
Thailand
Belgium
Taiwan
South Korea

Question: What concerns do you have about your current insurance program?
1. Will we be covered for certain events/occurrences, or will there be exclusions?
2. Escalation of cyber premiums.

Question: What is your five-year vision for your risk management program?

1. More comprehensive coverage as new potential areas of liability emerge.
2. Maintain quality coverage and minimize annual increases

Question: Will you furnish audited financial reports?

Yes

Question: Who are the primary relationships and contact personnel for broker accountability?

General Counsel
Vice President of Finance and Business

Question: Who will be a part of the evaluation committee referenced in the RFP?

These individuals names are kept confidential until after the award.

Question: What would you rate your risk tolerance on a scale of 1-5 (1 = very risk averse and 5 = very risk tolerant)

1.75

Question: Is the University planning any significant changes in operations, major new construction, expansion or closure of programs that you would like us to comment on in our response?

None

Question: Will you provide copies of the documents contained in the 2022-23 renewal submission?

Yes

Question: Will you provide details (i.e., total cost, cause of action, steps taken to mitigate future losses, etc.) for all losses in excess of the policy retention?

None

Question: How many certificates of insurance from The Citadel are requested annually?

Annually we have 5 – 6 standing COI’s and over the last few years, we have seen 10 – 15 COI’s to various agencies. The last couple of years we have provided COI’s to athletics for off campus practice sessions prior to games (basketball, football, baseball and track).

Question: What improvements would you like in your risk management program?

Requestor 1: I have no recommendations for improvement at this time – we have a good working relationship with the Insurance Reserve Fund (IRF) and a good working relationship/understanding with our IRF rep along with the contracted adjusters assigned to all claims.
Requestor 2: Proactive offering of new insurance for areas we did not realize we had exposure.
Requestor 3: Explore what additional services insurance providers include, such as penetration testing and free legal consultation.

Question: Will you provide 7 years of loss runs for each existing line of coverage?

Yes. See the last page.

Question: Are there currently any unique or special claims or loss control services being performed?

No

Question: Does broker assist the Safety and Emergency Response committee with disaster/emergency planning?
No

Question: Is a separate RFP issued for property insurance?
No

Question: Do you have an enterprise or strategic risk management program?
Yes

Question: Is there a cyber liability policy in place?
Yes

Question: Has any cyber benchmarking and risk assessments been done?
Yes, both internal and external.

Question: Will you provide copies of all current policies?
Yes

Question: Property insurance is not mentioned in the RFP, is it insured separately under a different RFP process?
No, property is insured under the State of South Carolina Insurance Reserve Fund.

Question: How has the school responded to the administration’s new guidance on Title IX oversight?
Any change in law will prompt us to change our policy and procedures to align with the requirements. In addition, there are usually changes in our education and prevention programs as well.

Question: Do you outsource Title IX investigations?
We have not during the tenure of our current Title IX Coordinator (since Jan. 2020). However, there are times when a case is particularly high-profile or has various conflicts of interest in which we may elect this route.

Question: During the adjudication of Title IX matters, do you contract with third party advisors?
No, we do not. The parties are entitled to their advisor of choice, and if they do not have an advisor, we appoint one. The individual is an internal citadel employee.

Open Claims as of 4/19/2023

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<tr>
<th>Claim</th>
<th>Policy Number</th>
<th>Date of Loss</th>
<th>Cause of Loss</th>
<th>Claimant Name(s)</th>
<th>Paid Losses</th>
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Closed Claims as of 4/19/2023
DESCRIPTION OF CHANGES:

Other Change: Describe

The Closing Date is extended to Thursday, May 18, 2023, at 2:00 PM to allow additional time to prepare submission responses.
IMPORTANT NOTICE:
X Contractor is required to acknowledge receipt of this Addendum by signing below and returning a copy with its Offer.

Except as provided herein, all terms and conditions of the Solicitation referenced above remain unchanged and in full force and effect.

SIGNATURE OF PERSON AUTHORIZED TO EXECUTE ON BEHALF OF OFFEROR

Signature: ____________________________________________

Printed Name & Title: ________________________________

Company Name: ____________________________________

Date: _____________________________________________

Rev 04/2021