US Request for Proposals (RFP)

PF No. and Title: 2026-10-02, Global P&C Insurance Broker

RFP Issue Date: October 20, 2026

RFP Written Questions to be Submitted By: October 30, 2026

Proposal Submission Deadline: November 18, 2026 (5:00pm EST)

Contractor: Helen Keller International (Helen Keller Intl)

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Bidders are encouraged to read this RFP and all attachments paying specific attention to the instructions and requirements. Issuance of this RFP does not in any way obligate Helen Keller International to award a contract, nor does it commit Helen Keller Intl to pay for costs incurred in the preparation and submission of a proposal. All recipients of this RFP shall treat all information and details included herein as private and confidential.

SECTION 1: Introduction and Eligibility

Introduction

Founded in 1915, Helen Keller International (Helen Keller Intl) is a nonprofit organization dedicated to saving and improving the sight and lives of the world's vulnerable by combatting the causes and consequences of blindness, poor health and malnutrition. Helen Keller Intl invites all eligible Bidders to submit proposals for qualified insurance brokerage service to meet Helen Keller Intl's global property and casualty (P&C) insurance needs.

The purpose of this Request for Proposals (RFP) is to select a vendor that will provide best value to Helen Keller Intl, when both technical and cost factors are combined.

Helen Keller Intl Programs

Our programs prioritize preventing and treating vision loss and blindness—as well as addressing major global health problems such as malnutrition and neglected diseases that threaten sight, productivity, and well-being. In Africa, Asia, Europe, and the U.S., Helen Keller Intl's proven, science-based programs empower people to create opportunities in their own lives and build lasting change. Working in 19 countries, we are ranked among the most effective charities in international development and global health. We have numerous programs around the world that reach millions of people each year.

- Helen Keller Intl's prevention of blindness work focuses on: cataract surgery, vision correction, vitamin A supplementation, screening and treatment for diabetic retinopathy, and distribution of treatments and cures for neglected tropical diseases.

- Helen Keller Intl works to reduce malnutrition by promoting solutions aimed at improving nutrition practices for millions of families. These include: vitamin A supplementation, maternal and child nutrition education, fortification of staple foods with essential nutrients, globally recognized family-led agricultural programs, and community-based management of acute malnutrition.

- Helen Keller Intl reaches tens of thousands of under-served youth in the United States each year through our US Vision Program. This unique program provides free vision screenings and prescription eyeglasses to students in vulnerable communities. The program is currently expanding its work to other vulnerable populations.

Helen Keller Intl works with hundreds of partners, including private foundations, companies, nongovernmental organizations, local, state and national governments, and university groups.

Operations

Helen Keller Intl is a 501(c)(3) not-for-profit corporation formed under the laws of the State of New York with its global Headquarters located in New York. Helen Keller Intl has an operating and support revenue of approximately $129 million and $123.7 million in net assets (as of 2025).

Helen Keller Intl has over 800 employees around the world. Most Helen Keller Intl employees are National staff, followed by approximately 70 US-based staff and a small number of US Expatriates and Third Country Nationals working overseas.

Helen Keller Intl staff take approximately 750 international trips each year to roughly 40 countries, and a far greater volume of in-country travel. The environments in which Helen Keller Intl staff live and work are complex, sometimes unstable, and inherently dangerous. Risks to our staff and their families, partners and program recipients range from dangers associated with conflict, civil and political unrest, accidents, terrorism and environmental conditionals. Helen Keller Intl takes its Duty of Care very seriously and continually works to ensure it meets its legal and ethical obligations to its staff.

For more information about us, visit our website www.helenkellerintl.org and download the Annual Report.

Helen Keller Intl's Approach to Risk

Helen Keller Intl recognizes that risks are inherent in every aspect of its operation, and that these risks cannot be entirely avoided or eliminated. Helen Keller Intl has a policy of actively and systematically seeking to identify, assess and mitigate its exposure to risks. Whenever possible, Helen Keller Intl seeks to adopt an approach to either avoid or reduce risks or transfer them to partners or insurers. Helen Keller Intl's philosophy and practice lean toward risk aversion, accepting no situation or condition that might significantly jeopardize the safety of staff, or the ability of Helen Keller Intl to continue to pursue and achieve its mission. Strategic or programmatic opportunities that do present risks are not dismissed outright but are carefully considered on a case-by-case basis by senior staff and/or the Board of Trustees. The global Risk Management Committee is responsible for providing an annual risk report to the Board each year.

Current Risk & Insurance Management Programs
The Operations Unit is responsible for managing Helen Keller Intl's global P&C Insurance portfolio, apart from health and welfare benefits which are purchased by People & Culture. Country offices are responsible for ensuring compliance with any local insurance regulations.

The Operations Unit purchases property and casualty coverage, including:

- Commercial Package
- Professional Liability (US Operations)
- Commercial Umbrella (US Operations)
- Domestic Workers Compensation
- Foreign Package
- Travel Accident
- ERISA Bond
- Directors & Officers/Fiduciary Liability
- Commercial Crime
- Excess Molestation & Abuse
- Cyber Policy

Eligibility of Bidders
This RFP is open to non-governmental entities that are deemed capable of implementing the scope of work, with a solid record of integrity and business ethics, and that meet the eligibility requirements stated in this Section.

Bidders that submit proposals in response to this RFP must meet the following requirements:

- Be a non-government entity legally registered under the laws of the country where it is operating
- Have demonstrated capacity and expertise to successfully implement the Scope of Work
- Be willing to comply with any relevant donor regulations and Helen Keller Intl requirements.

Note: Helen Keller Intl will not award a contract to any firm that is debarred, suspended, or proposed for debarment by the U.S. Government, or who proposes to do business with firms or firms' principals who are debarred, suspended, or proposed for debarment, in the performance of the requirement of this activity.

SECTION 2: Scope of Work
Helen Keller Intl will evaluate all proposals received in response to this RFP in accordance with the evaluation criteria below.

This RFP contains the following Annexes:

- Annex A: Conflict of Interest Disclosure
- Annex B: Schedule of Helen Keller Intl Operational Countries
- Annex C: Vendor Data Security Questionnaire
- Annex D: Confidentiality and Non-Disclosure Agreement

Scope of Work, Key Objectives and Activities
Helen Keller Intl is seeking brokerage representation that:

- Designs, negotiates and delivers premium comprehensive P&C insurance coverage that reduces risk at an affordable cost.
- Understands the international non-governmental organization (INGO) operating landscape, associated risks and insurance requirements.
- Has international capabilities to place coverages in the countries where Helen Keller operates.
- Provides high-end expertise and guidance.
- Provides tools and summaries to clients to conduct analysis when making decisions.
- Embodies a shared sense of responsibility, teamwork, and will be Helen Keller's advocate.
- Provides certificates of insurance as requested.
- Keeps Helen Keller informed of new developments and trends in the insurance market for relevant lines of insurance and provides periodic evaluations and benchmarking of Helen Keller's evolving risk exposure and insurance needs.
- Actively works to identify risks/exposures and recommend remedial strategies.
- Assists Helen Keller on an ongoing basis with managing its policies, any claims and issues that arise.

Deliverables and Illustrative Timeline
The timeline for the RFP process is as follows. Helen Keller reserves the right to make adjustments:

October 20, 2026: RFP distributed
October 27, 2026: Broker Non-Disclosure Agreement due
October 30, 2026: Individual Broker RFP written questions due
November 18, 2026: Broker Proposals due
December 14-18, 2026: Finalist Broker Presentations
January 2027: Broker Selected:
February 2027: In-depth review of HKI Intl's P&C coverages with selected broker
June 2027: Re-bid HKI Intl's coverages
July1, 2027: Bind P&C Coverages for FY28

Non-Disclosure Agreement Instructions
Brokers intending to bid must return the *Confidentiality & Non-Disclosure Agreement,* attached in Annex D*,* by October 27, 2026 to Laurie Kovacs (LKovacs@hki.org). Once received, details on Helen Keller Intl's P&C coverage will be sent.

Anticipated Contracting Period and Award Mechanism
The anticipated period of performance is expected to be 36 months beginning on or about February 1, 2027.

Helen Keller Intl intends to award a firm fixed price Professional Services Contract to the winning offer. No profit, fees, taxes, or additional costs may be added after award.

SECTION 3: Proposal Instructions
The Bidder's proposal will consist of two separate documents:

Part 1 - Technical Offer
Part 2 – Financial Offer

The Technical Offer and the Financial Offer (altogether "proposal") must be submitted separately. The Bidder should not include any cost data in the Technical Offer.

The proposal should explain in detail the Bidder's availability, experience and resources to provide the requested services.

The Proposal must be submitted with a **Cover Letter** which must include the following information and must be signed by an authorized representative of the Bidder organization:

- Date of Submission of the Proposal
- Term of proposal validity (minimum 90 days)

- Full Legal Name of the company/organization
- Name and title of authorized representative of organization
- Type of company/organization
- Address, Telephone, E-mail
- Taxpayer Identification Number
- Other required documents that shall be included as attachments to the cover letter:
  - Copy of registration or incorporation where the bidder is registered.

Bidders must also submit the signed Conflict of Interest Declaration Form (Annex A). This form will be assessed to establish whether the Bidder has any present or potential future conflict of interest according to the definition in Annex A. Failure to accurately complete the Conflict of Interest Declaration Form may lead to the rejection of the submitted proposal.

Proposals that are incomplete or do not address these criteria may not be considered in the review process.

Part 1: TECHNICAL OFFER

The Technical Offer should be in the English language, typed in Microsoft Word, single-spaced, with each page numbered consecutively. A maximum number of pages for each component of the Technical Offer is given below.

The Technical Offer should include the following:

1) Bidder past performance record/relevant experience– 3 **pages maximum**

Details About Your Firm

1. Provide a brief history and description of your firm, including:
   - Approximate annual revenues.
   - Number of offices and employees.
   - Specialty practices.
   - Number of clients, including number of nonprofit clients.
   - Describe your company's systems for safeguarding client data and information, including the data security certifications maintained.
   - Describe the insurance maintained by your company that will be relevant to this engagement, such as general liability and cyber liability. Please include a narrative description of your systems to ensure compliance with the General Data Protection Regulation (GDPR) and any relevant policies and documented standard practices to manage data provided by Helen Keller Intl through the application process at the outset as well as any information shared during any claims resolution process.
   - Other information to help Helen Keller Intl assess the depth of your firm's resources and potential "fit."

2. Provide information on who at your firm would be assigned to work with Helen Keller Intl and why.
   - Brief summary of each proposed team member (educational/professional credentials, number of years in the industry, number of clients serving and INGO experience).
   - Identify who would be the primary point of contact and secondary contact.

3. Describe your firm's business model. Explain how you cultivate your relationship with the insurers and leverage your client base to get the best outcome for your clients.

4. Briefly explain why your firm is well-positioned to handle Helen Keller Intl's insurance needs compared to your competitors.

Bidders must also provide contacts for at least three (3) professional references for previous work under similar statements of work. Contact information should include, at a minimum: name of individual and company, brief information on relationship to Bidder, address, email, and phone number. Helen Keller Intl reserves the right to contact any and all references provided. Contact information for references is not subject to the page limitation for this section.

2) **Technical approach –** {5} **pages maximum**
The technical approach must describe the proposed approach to achieving the program objectives and must address the following:

- A brief description of the Bidder's understanding of the objectives and scope of work for the consultancy.
- An overview as to how the Bidder would propose to complete the requested services indicated in this RFP.

Program Design & Placement

1. Helen Keller Intl will want to do an in-depth review of its current P&C program once a broker is selected. Based on this and the information Helen Keller Intl has provided to you, outline the conceptual approach your firm would take during the 1st year it has a relationship with Helen Keller Intl
   - Explain why it would be the best approach based on your understanding of Helen Keller Intl and our appetite for risk.
   - Explain how you would present our needs to the underwriters.
   - Explain the types of tools your firm would provide Helen Keller with to conduct this analysis.
   - Explain how you would benchmark us against similarly situated INGOs.
   - Include information on the insurers you would approach.
   - Include estimates for the various lines of coverage assuming the limits and retentions now in place.

2. Describe a typical renewal process with an existing client (2nd or 3rd year relationship).

3. Describe your firm's international capabilities, with emphasis on the countries Helen Keller Intl operates. Include information on how you would assist Helen Keller to conduct an audit of its current local coverage and place local in-country coverage.

4. Explain how you determine whether a rate increase in any given year is fair or appropriate.

5. Based on your understanding of our operational exposures and current insurance program structure, identify any major vulnerabilities that you perceive to risk of loss and opportunities for program enhancement, and describe the approach you would take to address them.

6. Indicate how current and anticipated insurance conditions might influence the design or placement of our insurance program for 2027-2028.

Risk and Insurance Management Services

1. Describe how your firm monitors changes and emerging trends in the INGO environment, including legal and operational risks and how you keep your clients informed.

2. Describe the resources that your firm would utilize to help Helen Keller Intl identify and analyze any risks.

3. Describe your experience evaluating medical and security evacuation services.

4. Describe any other services that your firm offers that could benefit Helen Keller Intl, especially in assisting to meet its Duty of Care obligations. Please note any additional costs.

3) **Team Structure requirements –** {3} **pages maximum, excluding CVs**

- Team structure: Bidders must describe the structure of the team that will deliver against the objectives and scope of work described in this RFP. Team structures must identify the project manager (or Team Leader) and other team members and the roles and responsibilities that each will have over the duration of the service agreement.

The Bidder must notify Helen Keller Intl if it intends to replace a key member of the Bidder's team (with an explanation for doing so) prior to the award date and provide Helen Keller Intl with the information required for the approval of a replacement proposal. Any replacement shall be subject to the approval of Helen Keller Intl. This is also valid for any replacement taking place during the contract duration.

Part 2: FINANCIAL OFFER

This contract will be issued as a firm fixed price contract with payments made against deliverables. Helen Keller Intl will only issue payment via electronic payment methods and all bank accounts must be in the name of the company/organization only.

As part of the Financial Offer, Bidders must include a detailed budget, expressed in US Dollars, with an accompanying budget narrative, describing the basis for the listed cost elements. Supporting information should be provided in sufficient detail to allow a complete analysis and determination of reasonableness of each cost element. Bidders are required to include and clearly label **all** costs deemed necessary to complete the work. Any other costs shall be agreed prior with Helen Keller Intl.

To understand your compensation structure, outline a proposed compensation arrangement (commission versus fee-based) for providing services to Helen Keller Intl. Explain why this arrangement would be the best approach for Helen Keller Intl and indicate if you charge for time and expense for learning about our business to recommend and place insurance products.

Explain how your firm would be held accountable for performance by Helen Keller Intl.

Identify any "value added" or other services offered by your firm and any associated costs.

SECTION 4: Evaluation Criteria and Award
Helen Keller Intl will follow a Best Value Trade-Off selection methodology. Helen Keller Intl may award to a firm whose proposal is most advantageous, with price and other factors considered. Bidders may not modify non-responsive offers after the proposal deadline in order to make them responsive. However, Helen Keller Intl may request a Bidder to clarify its offer as long as no material deviation exists.

The criteria below is the anticipated basis for evaluation. Selection will be based principally on the proposal technical merits, but price and other factors will be considered, and award will be made only if the proposal is determined to be technically acceptable and cost reasonable.

Evaluation Criteria
Past Performance/ Prior relevant experience
Personnel Qualifications/Team Composition
Program Design and Placement Proposal
Risk and Insurance Management Services Proposal
Presentation to Helen Keller Intl (for finalists)
References

Upon completion of the evaluation of Technical Offers, Helen Keller Intl will evaluate Financial Offers for budget presentation, details of the budget narrative, and cost effectiveness (reasonable, realistic, match the Technical Offer and meet requirements of RFP). No points are assigned to Financial Offers, but these criteria will be considered, in conjunction with the total score of the Technical Offer.

Your company shall refrain from contacting any insurance market or service provider on our behalf during this selection process. We reserve the right to disqualify any respondent for failure to comply with this requirement.

SECTION 5: Proposal Validity, Submission Deadline and Instructions
Proposals should have a 90-day validity period from the proposal submission date.

Proposals must be submitted electronically by the deadline listed on the cover page of this RFP by E-mail to Laurie Kovacs (LKovacs@hki.org) indicating in the subject line of the e-mail the company name and the RFP number.

A full proposal submission will include the following documents:

- Cover Letter
- Technical Offer
- Financial Offer
- Conflict of Interest Disclosure Form
- Non-Disclosure Agreement
- Copies of Bidder legal registration documents, as applicable
- Other pertinent information relevant to the proposal submission

Bidder Questions: No verbal questions will be taken in person or via telephone. However, Helen Keller Intl will take written questions about this RFP until the closing date. Any questions related to this RFP should be addressed to Laurie Kovacs (LKovacs@hki.org). In order to ensure fairness, Helen Keller Intl's responses to material questions will be communicated to all potential Bidders, ensuring the original requestor's anonymity.

SECTION 6: Negotiations

Best offer proposals are requested and it is anticipated that an award will be made on the basis of the original offers received. However, Helen Keller Intl reserves the right to conduct discussions, negotiations and/or request clarifications prior to awarding a contract. Furthermore, Helen Keller Intl reserves the right to conduct a competitive range and to limit the number of bidders in the competitive range to permit an efficient evaluation environment among the most highly-rated proposals. Highest-rated bidders, as determined by the technical evaluation committee, may be asked to submit their best prices or technical responses during a competitive range. At the sole discretion of Helen Keller Intl, bidders may be requested to conduct oral presentations. Helen Keller Intl reserves the right to make separate awards per component or to make no award at all.

SECTION 7: Terms of the Solicitation

Issuance of this RFP does not constitute an award commitment on the part of Helen Keller Intl, nor does it commit Helen Keller Intl to pay for costs incurred in the preparation and submission of a bid.

1. Attached files are an integral part of this RFP.

2. Helen Keller Intl may contact Bidders to confirm contact person, address, bid amount and to confirm that the proposal was submitted for this solicitation.

3. False Statements: Bidders must provide full, accurate and complete information as required by this solicitation and its attachments.

4. Conflict of Interest Disclosure: In Annex A Bidders must provide disclosure of any past, present or future relationships with any parties associated with the issuance, review or management of this solicitation and anticipated award. Failure to provide full and open disclosure may result in Helen Keller Intl having to re-evaluate selection of a potential Bidders.

5. Right to Select/Reject: Helen Keller Intl reserves the right to select and negotiate with those firms it determines, in its sole discretion, to be qualified for competitive proposals and to terminate negotiations without incurring any liability. Helen Keller Intl also reserves the right to reject any or all proposals received without explanation.

6. Reserved rights: All RFP responses become the property of Helen Keller Intl and Helen Keller Intl reserves the right in its sole discretion to:
   a. To disqualify any offer based on Bidder's failure to follow solicitation instructions;
   b. To waive any deviations by Bidders from the requirements of this solicitation that in Helen Keller Intl's opinion are considered not to be material defects requiring rejection or disqualification or where such a waiver will promote increased competition;
   c. Extend the time for submission of all RFP responses after notification to all Bidders;
   d. Terminate or modify the RFP process at any time and re-issue the RFP to whomever Helen Keller Intl deems appropriate;
   e. Issue an award based on the initial evaluation of offers without discussion;

f. Award only part of the activities in the solicitation or issue multiple awards based on solicitation activities.

7. Bidders and its proposed personnel shall disclose any factors that could limit the organization's ability to independently perform the services such as relationship with counterpart employees, past employment, etc.

ANNEX A: Conflict of Interest Disclosure

Helen Keller Intl Code of Conduct & Ethics Policy: In accordance with the Helen Keller Intl Code of Conduct and Ethics Policy, Helen Keller Intl requires full and open disclosure when dealing with procurement. As such, Helen Keller Intl employees must avoid any conflict of interest or the appearance of a conflict of interest. Helen Keller Intl employees must at all times provide full disclosure of their actions or relationships with prospective vendors, contractors, or consultants. Helen Keller Intl employees shall not solicit, request, accept, or agree to accept any gift from a vendor or prospective vendor.

Helen Keller Intl reserves the right to reject any or all quotes when considered to be in the best interest of the organization and/or the people it serves. All parties submitting a proposal in response to this Request for Proposal are obligated to disclose the existence of any actual or possible conflict of interest relating to every country included within their proposal in the attached *Conflict of Interest Declaration Form*.

Failure to fully disclose such information could lead Helen Keller Intl to reject a proposal. If a party has no conflict to declare for any of the countries covered in their proposal, they may submit one form, listing all of the countries covered.

"**Conflict of Interest**" means a situation in which an Bidder, or an Affiliate (as defined below), or a sub-contractor (if any) of an Bidder, has interests (financial, organizational, personal, reputational or otherwise) that would or may appear to make it difficult for an Bidder to fulfill its obligations to Helen Keller Intl in its role as the vendor in an objective, independent and professional manner, or a situation in which it is reasonable to foresee that such an interest would arise. A Conflict of Interest may arise in the following circumstances, which are not exhaustive:

- a Bidder has been, or is involved in the design of a proposal or request for funding that has been, or will be submitted to Helen Keller Intl;
- a Bidder has been, or is involved in the provision of advice to an entity that is a Principal Recipient or a Sub-recipient;
- a Bidder has been, or is involved in, or has provided advice in relation to the procurement of goods and/or services by a Principal Recipient and/or a Sub-recipient;
- a Bidder has been, or is involved in the provision of auditing services to a Principal Recipient and/or a Sub-recipient; or
- a Bidder has submitted an expression of interest, tender, bid or otherwise indicated interest in providing services of any nature to a Principal Recipient or a Sub-recipient that remains valid at the time of, and for the duration of the term of this Contract.

"**Affiliate**" means a business concern, individual or other entity that, directly or indirectly: (i) controls or can control a Bidder; (ii) is controlled by, or can foreseeably be controlled by, a Bidder; or (iii) along with a Bidder, is controlled by, or can foreseeably be controlled by, the same third party.

Bidder Conflict of Interest Declaration Form

Please check one box below, as appropriate:

☐	The Bidder hereby declares that it has read, understood and agrees to comply with the Conflict of Interest rules set forth in the Request for Proposals (RFP) and warrants that no Conflict of Interest exists on the part of the Bidder or an Affiliate of the Bidder, with regard to the services to be performed under the RFP.
☐	The Bidder wishes to disclose a real or potential Conflict of Interest situation(s) and propose mitigating action(s). *Note:* if this box is checked, please describe in an attachment, *in detail*, the situation and present a proposed mitigation plan / arrangement for consideration by Helen Keller Intl.

Bidder:

Signature:	
Printed Name:	
Title:	
Date:	

ANNEX B: Schedule of countries Helen Keller Intl operates

Bangladesh
Burkina Faso
Cambodia
Cameroon
Cote d'Ivoire
DR Congo
Guinea
Kenya
Madagascar
Mali
Mozambique
Nepal
Niger
Nigeria
Philippines
Senegal
Sierra Leone
Tanzania
United States

Helen Keller Intl may commence operations in additional countries or terminate operations in current countries over this service contract period.

ANNEX C: Vendor Data Security Questionnaire

This questionnaire is provided for reference and will only be requested from finalists.

Company Name:	
Address:	
Completed By:	
Title:	
Email:	
Date:	

Regulatory Compliance & Data Protection	Yes	No
1. Vendor conducts data processing in full compliance with any and all applicable statutes, regulations, rules, standards of any official body with jurisdiction over the work of Helen Keller Intl or over the work of the Vendor?		
a. GDPR Standards		
b. NYS SHIELD Law		
c. PCI		
d. Others – Please list		
Comments:		
2. Vendor services relating to PHI or PII, including data processing, are performed by Business Partners? The Business Partner hosts data that is PHI or PII? Please provide a summary explanation.		
Comments:		
3. If yes, does the Vendor mandate through a service agreement that the Business Partners are in compliance with all applicable privacy and data security obligations and regulations? How is compliance verified?		
Comments:		
Data Management & Security Systems	Yes	No
4. Vendor has standard operating procedures or internal guidelines for activities that involve the collection, storage, retrieval, use, sharing, retention and destruction of PHI or PII? If yes, please provide a summary description of these measures.		
Comments:		

5. Vendor implements security measures appropriate to securing access to websites, website applications and data, anonymizing and encrypting data, ensuring the ongoing confidentiality of data and restoring data? If yes, please provide a summary description of these measures.		
Comments:		
6. Vendor has systems or a process for regularly testing, assessing and evaluating the effectiveness of technical, physical and administrative protections that function to secure the management of PII and PHI		
Comments:		
7. Vendor has a current SOC2 certification, or an independent audit of data security systems has been conducted in the last 2 years? If yes, please provide a summary of these measures.		
Comments:		
8. Vendor has internal policy and processes for managing user access to applications and systems that support customer information processing? If yes, please provide a summary of these measures.		
Comments:		
9. Vendor carries cyber insurance coverage? If so, at what limit?		
Comments:		
10. Vendor is able to dispose of, or at least properly secure, all copies of Helen Keller Intl-related data upon termination of the agreement?		
Comments:		
Additional Data Security Controls	Yes	No
11. Vendor has established protocols for the response to disaster or security incidents, including data breaches? (If data processing is managed by a Business Partner, the Partner's protocols related to disaster or security incidents have been verified?) If yes, please provide a summary description of these measures.		
Comments:		

12. Vendor has an identified Data Protection Officer – or an employee with equivalent responsibility - who is responsible for data security and adherence to applicable regulations?		
Name and Title		
13. Vendor has a staff training program in place that is mandatory for staff processing personal identifiable information? If yes, please provide a summary description of the program.		
Comments:		

ANNEX D: Helen Keller Intl Request for Proposal Confidentiality and Non-Disclosure

October 20, 2026

This Request for Proposal Addendum forms a part of the Terms and Conditions included in the Helen Keller International ("Helen Keller") Property and Casualty Insurance Broker Request for Proposal dated October 20, 2026 (the "RFP").

As a precondition to Helen Keller providing any information concerning its RFP for the services described therein, the undersigned hereby agrees on behalf of his or her brokerage to the following confidentiality and non-disclosure terms.

1. In connection with the RFP for Property and Casualty Insurance Brokerage Services (the "RFP"), Helen Keller will make available to bidders and any successful vendors (each, a "Recipient") certain non-public confidential and proprietary information relating to Helen Keller and its affiliates including, without limitation, plans, projects, programs, strategies, methods, processes, systems, products, names, contact information, and financial and technical information (collectively, "Confidential Information"). The term "Confidential Information" does not include information which, with respect to a Recipient (i) is or becomes generally available to the public other than as a result of a disclosure by such Recipient, (ii) was within the possession of such Recipient prior to its being furnished by or on behalf of Helen Keller, provided that the source of such information was not known by such Recipient, after reasonable investigation, to be bound by a contractual, legal or fiduciary obligation of confidentiality to HKI or any other party with respect to such information, (iii) becomes available to such Recipient on a non-confidential basis from a source other than Helen Keller, provided that such source is not known by such Recipient, after reasonable investigation, to be bound by a contractual, legal or fiduciary obligation of confidentiality to Helen Keller or any other party with respect to such information, or (iv) has been or is subsequently independently conceived or developed by such Recipient without use of or reference to the Confidential Information.

2. Each Recipient will use the Confidential Information solely for the purpose of providing, or seeking to provide, services in connection with the RFP, and for no other purpose. Each Recipient will keep the Confidential Information confidential and will not disclose any of the Confidential Information to any third parties; provided that a Recipient (i) may make any disclosure to which Helen Keller gives its prior written consent and (ii) may disclose Confidential Information to its Representatives who have a need to know such information solely in connection with the RFP; provided that any such Representative shall be advised of and be bound by these Confidentiality and Non-Disclosure provisions to the same extent as such Recipient which shall be responsible for any breach of these terms by its Representatives. "Representatives" of a Recipient shall mean its affiliates, directors, officers, employees, agents and advisors.

3. In the event that a Recipient or any of its Representatives is required by law, regulation or court order to disclose any Confidential Information, such Recipient or Representative immediately will, to the extent permitted by law, notify Helen Keller in writing prior to making any such disclosure, to facilitate HKI seeking a protective order or other appropriate remedy. If Helen Keller is not successful in preventing such disclosure, such Recipient or Representative will disclose only that portion of the Confidential Information that is legally required and will exercise best efforts to obtain reliable assurances that confidential treatment will be accorded the Confidential Information.

4. All Confidential Information is and will remain the property of Helen Keller. Upon termination of its relationship with Helen Keller, or at any other time upon the request of Helen Keller, each Recipient will return all Confidential Information promptly to Helen Keller, and permanently delete all digital and/or other electronic copies of Confidential Information that it may have in its possession. Upon the request of Helen Keller, each Recipient will certify compliance with the foregoing to Helen Keller in writing.

5. In the event of a breach or threatened breach of this Agreement by a Recipient or its Representative, Helen Keller will have no adequate remedy in money or damages, and accordingly will have the right to seek injunctive and/or other equitable relief against such Recipient, without bond, in addition to all other rights and remedies that it may have against such Recipient. Such Recipient will be fully responsible for all losses, damages, liabilities, penalties, costs and expenses incurred by Helen Keller in connection with any breach of this Agreement by such Recipient and/or any of its Representatives.

6. These Confidentiality and Non-Disclosure provisions shall be governed by, and construed in accordance with, the law of the State of New York.

Dated:_____

Signed:_____

On behalf of: _____