Woodsboro ISD

Request for Proposal (RFP)

Property, and Automobile Coverage



Package includes:

- Bid Specifications
- Underwriting Data
- Proposal Response Forms

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SECTION 1 General Information General Conditions

A. <u>The Woodsboro Independent School District</u> (hereafter referred to as Entity) is requesting proposals for the following Property, Liability and Automobile coverage.

Property Building & Contents

Equipment Breakdown

Flood Earthquake

Scheduled Property (Floaters)/Inland Marine Electronic Data Media/Equipment Protection

Extra Expense

Crime (Includes Employee Dishonesty, Faithful

Performance, and Money & Securities)

Liability General Liability

Personal Injury Liability Employee Benefits Liability

Automobile & Automobile Liability

Mobile Equipment Vehicles

Physical Damage Mobile Equipment

- B. Property insurance will be a market selection. Please see the market selection form (Exhibit IV) in section <u>6</u>. Requested market selections will be due to the district on December 22, 2022 at 10:00 am. Market assignments and notifications will be sent to prospective providers via email on 12/23/2022.
- C. Proposers may quote several plan options as long as each option is fully explained. All relationships between your company and any company offering coverage must be revealed, as well as any commission payments or fees that will be paid to the Proposer as a result of this bid award.
- D. Proposers are expected to examine the complete RFP document. Failure to do so will be at the Proposer's risk. Written questions about this RFP and requests for additional information shall be provided no later than February 01, 2023 (5:00 p.m.) to the Purchasing Department, Attn: David Segers, P.O. Box 770 Woodsboro, Texas, 78393 or you may fax your request to (361) 543-4856 or email: david_segers@wisd.net. The Entity will not respond to verbal inquiries.
- E. Proposers must submit one original and 2 copies (3 complete sets) of the proposal.

- F. Proposals will be received until 4:00 PM on February 13, 2023 at the (Entity office. The mailing address of this office is: P.O. BOX 770 Woodsboro, TX 78393. The physical location of this office is: 408 Kasten St., Woodsboro, TX 78393
- G. Proposals must be plainly marked on the outside of the envelope: "SEALED PROPOSAL FOR PROPERTY, LIABILITY AND AUTOMOBILE COVERAGE."
- H. The Entity reserves the right to accept or reject any or all proposals, waive any formalities and/or technicalities in the proposal and award the contract to best serve the interests of the Entity. The Entity may negotiate with Proposers as deemed advisable or necessary.
- H. All Proposals must be submitted on the **Proposal Forms** attached hereto, in accordance with all specified conditions. Coverage shall be for one year beginning: <u>March 1, 2023.</u>
- I. Any restrictions, deviations or other modifications which alter or reduce coverage as specified in this RFP must be shown separately and explained in writing. Failure to attach an explanation of deviations to this proposal will indicate your acceptance of the specifications as written.
- J. Proposers are required to submit specimen coverage documents, agreements, and/or contracts the Entity will be required to sign in order to purchase the coverage quoted.
- K. Please indicate the method for payment and any optional methods that may be available.
- L. It is the intent of the Entity to award the proposal to one carrier who can provide all lines of coverage as a package. Preference may be given to packaged proposals; however, final purchasing decisions will be made based on the options that are most advantageous to the Entity. In addition to package pricing, please indicate if monoline pricing is available.
- M. Due care and diligence have been used in the preparation of these specifications and the information contained herein is believed to be substantially correct. However, the responsibility for determining the full extent of the exposure and the verification of all information presented herein shall rest solely on the Proposer. The Entity and its representatives will not be responsible for any errors and omissions in the specifications nor for the failure on the part of the Proposer to determine the full extent of the exposures.
- N. Quotations shall be based on the underwriting information furnished by the Entity. Loss data is believed to be correct but is not warranted. If inspections are required, please coordinate them through the Business Office by contacting: Pam Niemann at 361-543-4518.

Minimum Qualifications

- A. Proposers responding to this RFP must be licensed and/or authorized to do business in Texas and have at least 5 years experience writing Property, Liability and Automobile coverage in Texas. Proposer qualifications must be included as an exhibit to your proposal.
- B. Proposers must attach a brief biography describing the experience of the person assigned to handle this account.
- C. Submit a summary of all Property, Liability and Automobile services available to the Entity. Indicate charges for services that are in addition to the quoted contributions/premiums.
- D. Proposers must have an Errors and Omissions policy with a minimum limit of \$1,000,000 per occurrence. Attach current certificate of coverage.
- E. Self-funded programs or plans organized under the terms of the Interlocal Cooperation Act (Chapter 791, Title 7, Government Code) shall be accepted provided the program offers coverage that are equivalent to a fully insured program.
- F. The Proposer's last 3 years audited financial statements must be included with the proposal.

SECTION 2

Underwriting Information General Underwriting Questions / Answers

Has the board impleme	ented specific loss prevention policies?	Υ		N	
Is there a swimming po	ool at any location?	Υ		N	Х
- If yes, please attach.					
Do you operate a dayc	are center?	Υ		N	Х
- If yes, can the genera	al public utilize the center?	Υ		N	
- Is the center operate	d by Entity employees?	Υ		N	
Does the applicant owr	n or lease any watercraft?	Υ		N	Х
Does the applicant owr	n or charter any aircraft?	Υ		N	X
Does the applicant engloaning or leasing of pr	gage in any activities, other than school activities, including the operty?	Y		N	Х
- If yes, please list and	l explain in detail				
- Are certificates of ins	urance required from lessee?	Υ		N	
Is the applicant engage	ed in any joint ventures, cooperatives or SSA's?	Υ	Х	N	
	l explain in detail: Goliad Special Education Cooperative, Region chnology, Migrant, ESL)				
Does the applicant emp	ploy police or security guards in any capacity?	Υ	Х	N	
- If yes, are they certifi & Education (TCLEC	ed by Texas Commission of Law Enforcement Officer Standards (SE)?	Y	Х	N	
- If yes, how many?	1			-	
Does the applicant hav	re an on-site physician(s), medical/dental clinics, or a pharmacy?	Υ		N	Х
If yes, is it operated by	the Entity?	Υ		N	
If yes, are they employ	ees of the Entity?	Υ		N	

Loss History for Past Five Years

A five-year loss history report for all lines of business requested in this RFP is attached. See Exhibit I.

SECTION 3

Coverage Specifications Property and Contents

	buildings, contents and such as fences, light po		t all locations inc
	ull Replacement Cost	•	
Peril	Deductible	Deductible	Options
All Other Perils	\$	\$	•
Wind Hail and Hurricar		* \$	
Named Windstorm	\$ 3% PER OCCURANCE	\$	
Wind Driven Rain	10,000.00		
Flood	10,000.00		
Extra Expense \$ 1,0	00,000.00 per occur	rence	
	on newly acquired Pro		mits for up to 90 a
equipment, valuable p a. Type of Coverag b. Basis of Recove	e All Risk	and dudie, violati	equipment, agric
a. Type of Coverag		Deductible(s)	едирттепт, адпо
a. Type of Coverag b. Basis of Recove	e All Risk ry Full Replacement Cost Limit \$		per occurrence
a. Type of Coverag b. Basis of Recover Classification	e All Risk ry Full Replacement Cost Limit \$	Deductible(s) \$ \$	per occurrence
a. Type of Coverag b. Basis of Recover	e All Risk ry Full Replacement Cost Limit \$	Deductible(s)	per occurrence
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a. Type of Coverag b. Basis of Recover Classification ectronic Data Protect a. Type of Coverage b. Basis of Recovery	e All Risk ry Full Replacement Cost Limit \$ \$ \$ ction for owned computation	Deductible(s) \$ \$ \$ ter equipment isk coverage Replacement Cost	per occurrence
a. Type of Coverag b. Basis of Recover Classification ectronic Data Protect a. Type of Coverage b. Basis of Recovery	e All Risk ry Full Replacement Cost Limit \$ \$ \$ ction for owned computation of the compu	Deductible(s) \$ \$ \$ ter equipment isk coverage Replacement Cost	per occurrence per occurrence per occurrence
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a. Type of Coverag b. Basis of Recover Classification ectronic Data Protect a. Type of Coverage b. Basis of Recovery c. Single Blanket Lin Limit per location:	e All Risk ry Full Replacement Cost Limit \$ \$ \$ stion for owned computed All Replacement Cost All Replacement Cost **The computed Compu	Deductible(s) \$ \$ \$ ter equipment isk coverage Replacement Cost 00,000.00	per occurrence per occurrence per occurrence
a. Type of Coverag b. Basis of Recover Classification ectronic Data Protect a. Type of Coverage b. Basis of Recovery c. Single Blanket Lir Limit per location:	e All Risk ry Full Replacement Cost Limit \$ \$ \$ ction for owned computable All R Full F mit (all locations) \$2,0	Deductible(s) \$ \$ \$ ter equipment isk coverage Replacement Cost 00,000.00	per occurrence per occurrence per occurrence
a. Type of Coverage b. Basis of Recover Classification ectronic Data Protect a. Type of Coverage b. Basis of Recovery c. Single Blanket Lir Limit per location: \$	e All Risk ry Full Replacement Cost Limit \$ \$ \$ ction for owned comput All R Full F mit (all locations) \$2,0	Deductible(s) \$ \$ \$ ter equipment isk coverage Replacement Cost 00,000.00	per occurrence per occurrence per occurrence OR
a. Type of Coverage b. Basis of Recover Classification ectronic Data Protect a. Type of Coverage b. Basis of Recovery c. Single Blanket Lint Limit per location: \$ \$ \$	e All Risk ry Full Replacement Cost Limit \$ \$ \$ ction for owned comput All R Full F mit (all locations) \$2,0	Deductible(s) \$ \$ ter equipment isk coverage Replacement Cost 00,000.00	per occurrence per occurrence per occurrence OR
a. Type of Coverage b. Basis of Recover Classification ectronic Data Protect a. Type of Coverage b. Basis of Recovery c. Single Blanket Lir Limit per location: \$ \$ \$ \$ \$ \$	e All Risk ry Full Replacement Cost Limit \$ \$ \$ stion for owned comput All R Full F mit (all locations) \$2,0 Location Location Location Location Location	Deductible(s) \$ \$ \$ ter equipment isk coverage Replacement Cost 00,000.00	per occurrence per occurrence per occurrence Per occurrence OR
a. Type of Coverage b. Basis of Recover Classification ectronic Data Protect a. Type of Coverage b. Basis of Recovery c. Single Blanket Lir Limit per location: \$ \$ \$ \$	e All Risk ry Full Replacement Cost Limit \$ \$ \$ \$ stion for owned comput All R Full F mit (all locations) \$2,0 Location Location Location Location Location Location Location Location	Deductible(s) \$ \$ ter equipment isk coverage Replacement Cost 00,000.00	per occurrence per occurrence per occurrence OR

g. Automatic Coverage for Storage of Duplicates

Up to 20% at each location not to exceed \$50,000

h. Reproduction of Datai. Repair or Replace MediaBlanket Limits

Underwriting Information – Fire Protection

Are fire hydrants located on or across the street from each	campus?	Υ	Х	N	
Are fire alarm systems located in all buildings?		Υ	X	N	
Is the fire department paid or voluntary? - VOLUNTARY		Υ		N	
Is the applicant located in a town of less than 15,000 population?			Х	N	
- If yes, is the applicant within five miles of a town with a population of more than 15,000?				N	Х
- If yes, will that city's fire department respond to a fire at all your locations?			Х	N	
Does the applicant have a hooded ventilating system in the kitchen?			Х	N	
Does the applicant have a contract for hood-cleaning services?			Х	N	
- If yes, how often does the contractor clean the hood? Bi-Annually					

Underwriting Information – Building Maintenance / Occupancy

List any security measures such as burglar alarms, security lighting, etc.:				
Exterior building lighting, surveillance cameras				
Does the applicant have any buildings 30 years or older?	Υ	Х	N	
- If yes, has the wiring been updated to meet code specifications?	Υ	Х	N	
Are any owned or leased buildings being used for purposes other than their intended use?	Υ		N	Х
Are any owned or leased buildings controlled by the applicant currently vacant or unoccupied?	Y		N	х

Equipment Breakdown Coverage

Covered equipment unless otherwise indicated, includes electrical, mechanical and pressure equipment. It includes both Real Property, such as heating, cooking and electrical systems, and Personal Property, such as office and process equipment.

1.	Total number of locations occupied by the Entity:	See attached Exhibit VIII.		
2.	Type of Coverage	Comprehensive		
3.	Policy Limits Equal to property limits, not to exceed \$100,000,000			
4.	. Deductible \$1,000 or property deductible per occurr			
5.	Basis of Recovery	Repair or Replacement		
6.	Stipulated Time for Repair or Replacement: 24 months			
7.	Automatic Coverage for new locations	90 days		
8.	Expediting Expense	\$250,000 per occurrence		
9.	Hazardous Substance Cleanup	\$250,000 per occurrence		
10.	Property Damage	Included in Coverage Limit		

11.	Ammonia Contamination	Included in Coverage Limit		
12. Consequential/ Perishable Goods Damage		\$100,000 per occurrence		
13.	Extra Expense (24 hours)	Included in Coverage Limit		
14.	Excavation Costs	\$25,000 per occurrence		

Blanket Crime Coverage (Public Employee Blanket Bond)

1. Coverage will include employee dishonesty, loss inside and outside the premises for money and securities and faithful performance on a blanket basis.

2.	Blanket Limit	\$ 100,000.00
	Deductible	\$ 1,000.00

Underwriting Information – Blanket Crime Coverage (Public Employee Blanket Bond)

ondo mining morniadon Diames or morago (46.10 ±111.61	-,				
Total number of locations occupied by the Entity:						
Total number of locations at which money or securities are handled:	3					
How frequently are audits made?	ANNUALLY					
Are they made by an independent auditor or CPA?		Υ	Х	N		
Are countersignatures required?				N		
Are securities subject to joint control of two or more responsible employees?				N		
Number of employees and board members who handle money or securities, sign checks, authorize drafts, or audit accounts on a regular basis:						
Number of clerical personnel not listed above:				0		
Number of all other employees:				94		
What is the Average Daily Attendance (ADA) reported to TEA?		390				

General Liability, Personal Injury Liability and Employee Benefits Liability Coverage

1.	Limits of Liabil	ity:	\$1,000,000 per occurr	ence, no annual aggregate
	Deductible:	\$	100.00	

- 2. Pays expenses, including judgments and defense costs.
- 3. Provides coverage for care, custody, and control.
- 4. Includes incidental medical malpractice.
- 5. Provides coverage for libel, slander, and defamation of character.
- 6. Covers premises liability, advertising liability, and products liability on a per occurrence form.
- 7. Persons Covered/Insured **must** include named Entity, any trustees / board members, employees, student teachers, and volunteers.
- 8. Claims arising out of the negligent act, error, or omission of the Entity and/or its employees relative to the administration of employee benefit programs must be included.

Automobile Liability and Physical Damage Coverage

- 1. Schedule of Vehicles, including Mobile Equipment, Bus Seating Capacities, & Values: See attached Exhibit III.
- 2. Minimum Liability Limits & Coverage desired:

\$100,000 per person Bodily Injury limits,

\$300,000 per occurrence Bodily Injury limits,

\$100,000 per occurrence Property Damage limits

Optional Liability Limits - \$1,000,000 Combined Single Limits

- 3. Hired and Non-Owned Vehicle coverage shall be excess over any other valid and collectible insurance.
- 4. Physical Damage coverage for Vehicles (list deductible options desired):

a) Collision	\$ and	1000.00	deductible
b) Other Than Collision*			
1) Comprehensive	and	1000.00	deductible
2) Specified Perils	\$ and		deductible

^{*}When purchasing Other Than Collision coverage, Entity must choose either comprehensive or specified perils coverage.

Physical Damage coverage for Mobile Equipment (list deductible options desired):

a) Collision	\$ and	1000.00	deductible
b) Other Than Collision*			
1) Comprehensive	\$ and	1000.00	deductible
2) Specified Perils	\$ and		deductible

- *When purchasing Other Than Collision coverage, Entity must choose either comprehensive or specified perils coverage.
- 5. Fleet Automatic Coverage: Subject to audit (must be requested by member), it is agreed that automatic coverage is provided for substitute and newly acquired automobiles (cars, trucks, trailers, and buses) for the same coverage provided for all similar type automobiles.

Underwriting Information – Automobile Liability & Physical Damage

Are any transportation operations contracted to another? If yes, include name of contractor:	Υ	N	x
Are owned vehicles used by security personnel?	Υ	N	Х
How often do you run Motor Vehicle Reports on Entity drivers? MONTHLY			
Where are the vehicles housed and what is the total value of vehicles at each location	1?		
BUS BARN ELEMENTARY PARKING LOT			

SECTION 4

Loss Prevention

- 1. Attach a description of Loss Prevention services provided. Include a recent example of a loss prevention service completed by the Proposer's firm.
- 2. Provide the Proposer's experience and professional qualifications.
- 3. Describe any charges and the unit pricing of these services.
- 4. Describe the Proposer's philosophy on loss prevention.
- 5. List the name of the loss prevention representative(s) who will make scheduled appointments to the Entity. Indicate the frequency or schedule for these appointments.
- 6. Where is this loss prevention representative located?
- 7. Include a biography of the loss prevention representative(s) who would be assigned to our account.
- 8. Describe the specific risk management materials/resources that are available to the Entity. Indicate the additional charges, if any.
- 9. Describe the specific education and training provided to Entity personnel. Indicate additional charges, if any.

SECTION 5

Proposal Response Forms Company Information

Name of your company:	
Phone number:	
Facsimile number:	
Address:	
Primary business:	
Type of company: (corp., partnership, etc.):	
Year started in business:	
Number of years administering Property, Liability, Automobile in Texas:	
Number of years administering Property, Liability, Automobile for public educational entities:	
an owner or operator of the busine of the conduct resulting in the conv	oosal a notice as to whether the person submitting the bid or ess entity has been convicted of a felony and the description iction. The contract may be terminated if it is determined that to give notice or misrepresented the conduct resulting in the
funding, having examined the sp	the invitation for proposal on Property, Liability, Automobile pecifications and being familiar with all conditions in the to provide the services in accordance with the proposal se sheets.
company, corporation, firm, partner with any other Proposer, and that t of said proposal have not been c	ey are duly authorized to execute this contract, that this reship or individual has not prepared this proposal in collusion he contents of this proposal as to prices, terms or conditions ommunicated by the undersigned nor by any employee or d in this type of business prior to the official opening of this
Having reviewed the specification except as noted on the attachment	s, we have complied with all requirements and conditions labeled "Deviations."
Signature and title of authorized rep	presentative
Proposing Company	Date

Property and Contents Coverage

Limit	\$	Limit	\$
Deductible	\$	Deductible	\$
Total Cost	_\$	Total Cost	\$
Total Schedule	d Property Floaters		
Limit	\$	<u> </u>	
Deductible	<u></u> \$		
Total Cost	\$	<u> </u>	
Name of Compa	ny offering coverage:		 _
<u>DEVIATIONS</u> fro	m proposal specifications	:	
Farriage ent D	wa akalassin Cassanana		
<u>Equipment B</u>	<u>reakdown Coverage</u>		
Limit	\$	<u></u>	
Deductible	\$	<u></u>	
Total Cost	\$	<u> </u>	
Name of Compa	ny offering coverage:		_
	m proposal specifications		 _
<u> </u>	h. ahaam ahaamaana	=	

Crime

Name of Compan	y offering coverage:	
Total Cost	\$	
T-4-1 O4	•	
Deductible	\$	
Limit	\$	

<u>DEVIATIONS</u> from proposal specifications:

General Liability, Personal Injury Liability and Employee Benefits Liability

Limit	\$	
Deductible	\$	
Total Cost	\$	
Name of Company off	ering coverage:	
DEVIATIONS from pro	posal specifications:	

<u>Automobile Liability and Physical Damage Including Hired and Non-Owned Vehicles</u>

Automobile Liability Coverage

1.	Minimum Limits	\$100,000 / \$300,000	/ \$100,000	
	Deductible	\$250	\$500	\$1,000
	Cost	\$	\$	\$
2.	Optional Limits	\$1,000,000 Combined	d Single Limits	
	Deductible	\$250	\$500	\$1,000
	Cost	\$	\$	\$

Physical Damage Coverage

Deductible	\$250	\$500	\$1,000
Comprehensive	\$	\$	\$
Specified Perils	\$	\$	\$
Collision	\$	\$	\$

Name of Company offering coverage:

<u>DEVIATIONS</u> from proposal specifications:

Felony Conviction Notice

furnished is true to the best of my knowledge.

State of Texas Legislative Senate Bill No. 1, Section 44.034, Notification of Criminal History, Subsection (a), states "a person or business entity that enters into a contract with a school district must give advance notice to the district if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony."

Subsection (b) states "a school district may terminate a contract with a person or business entity if the district determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in the conviction. The district must compensate the person or business entity for services performed before the termination of the contract."

THIS NOTICE IS NOT REQUIRED OF A PUBLICLY HELD CORPORATION

I, the undersigned agent for the firm named below, certify that the information concerning notification of felony convictions has been reviewed by me and the following information

VE	ENDOR'S NAME:
Αl	JTHORIZED COMPANY OFFICIAL'S NAME (PRINTED):
A.	My firm is a publicly held corporation; therefore, this reporting requirement is not applicable.
	Signature of Company Official:
B.	My firm is neither owned nor operated by anyone who has been convicted of a felony:
	Signature of Company Official:
C.	My firm is owned or operated by the following individual(s) who has/have been convicted of a felony:
	Name of Felon(s):
	Detail of Conviction(s):
	Signature of Company Official:

_	rendor or other person			ernmental entity	FORM CIQ
This q	uestionnaire reflects change	s made to the law	v by H.B. 1491, 80 th Le	g., Regular Session.	OFFICE USE ONLY
persor	uestionnaire is being filed in who has a business relationmental entity and the pers	onship as define	d by Section 176.001	(1-a) with a local	Date Received
entity	or this questionnaire must be not later than the 7 th busine er the statement to be filed.	ss day after the	date the person beco	mes aware of facts that	
	son commits an offense if the nment Code. An offense ur				
1. I	Name of person who has	a business rela	tionship with local (governmental entity.	
2.	☐ Check this box if you	u are filing an u	pdate to a previous	ly filed questionnaire.	
				ionnaire with the appropriate becomes incomplete or in	re filing authority not later than the 7 th accurate.)
3.	Name of local governmen	t officer with w	hom filer has emplo	yment or business relation	onship.
			Name of O	fficer	
C					whom the filer has an employment Attach additional pages to this
	A. Is the local government ncome, from the filer of the		this section receiving	or likely to receive taxable	income, other than investment
		Yes	□ No	□NA	
C	B. Is the filer of the questio direction of the local govern governmental entity?				vestment income, from or at the treceived from the local
		Yes	□ No	□NA	
	C. Is the filer of this question				espect to which the local government
		Yes	□ No	□ NA	
[D. Describe each employme	ent or business r	elationship with the l	ocal government officer nar	ned in this section.
4.	Signature of person doir	ng business with	the governmental en	tity	 Date

SECTION 6

Exhibits

Exhibit I – Five Year Loss History for All Lines of Business Quoted

Five Year Loss History Report for:

- Property
- Equipment Breakdown
- Crime
- General Liability
- Automobile
- Any other lines of business requested in this RFP

Exhibit II – Property Schedule

Covered Property

(Insert a property schedule with values, age, and construction for each building and/or property appraisal)

Exhibit III – Vehicle and Mobile Equipment Schedule

Schedule of Vehicles & Bus Seating Capacities

Include Mobile Equipment Schedule

Section 6

Exhibit I - Five Year Loss History for All Lines of Business Quoted

Claim Detail by Program Year - PY12

Summary of all Transactions for Claims with a DOL in Period 03-01-2022 to 02-28-2023

Incurred

0.00

Claim Statuses as of 11-30-2022

Line of Business / Coverage	Open	Closed	Denied	No Status	Loss Payments	Expense Payments	Loss Reserves	Expense Reserves	Indemnity Recoveries	Total Incurred
LOB Not assigned										
No coverage assigned										
					0.00	0.00	0.00	0.00	0.00	0.00
Coverage Subtotals	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
LOB Subtotal	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
				Grar	nd Total for Enterp	rise				
Claim Counts				Loss	Expense	Loss	Expense in	ndemnity	Total	

Payments

0.00

Reserves

0.00

Reserves

0.00

Recoveries

0.00

Payments

0.00

Closed

0

Open

0

Claim counts reflect total number of unique claim ID's.

Denied

No Status

0

0.00

0.00

Claim Statuses as of 11-30-2022

Line of Business / Coverage	Open	Closed	Denied	No Status	Loss Payments	Expense Payments	Loss Reserves	Expense Reserves	Indemnity Recoveries	Total Incurred
LOB Not assigned										
No coverage assigned										
					0.00	0.00	0.00	0.00	0.00	0.00
Coverage Subtotals	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
LOB Subtotal	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
				Gran	nd Total for Enterp	orise				
Claim Counts				Loss	Expense	Loss	Expense in	ndemnity	Total	
Open Closed Denied No	Status		Pa	yments	Payments	Reserves	Reserves Re	coveries	Incurred	

0.00

0.00

0.00

0.00

0

0

Claim counts reflect total number of unique claim ID's.

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Claim Detail by Program Year - PY10

Summary of all Transactions for Claims with a DOL in Period 03-01-2020 to 02-28-2021

Claim Statuses as of 11-30-2022

Line of Business / Coverage	Open	Closed	Denied	No Status	Loss Payments	Expense Payments		Expense Reserves	Indemnity Recoveries	Total Incurred
LOB Not assigned										
No coverage assigned										
					0.00	0.00	0.00	0.00	0.00	0.00
Coverage Subtotals	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
LOB Subtotal	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
				Grar	nd Total for Enterp	orise				
Claim Counts				Loss	Expense	Loss	Expense	ndemnity	Total	
Open Closed Denied No St	atus		Pay	ments	Payments	Reserves		coveries	Incurred	
0 0 0	0			0.00	0.00	0.00	0.00	0.00	0.00	

Claim counts reflect total number of unique claim ID's.

Property Casualty Alliance of Texas

Claim Statuses as of 11-30-2022

Woodsboro ISD									
Line of Business / Coverage	Open CI	osed	Denied No Statu	Loss s Payments	Expense Payments	Loss Reserves	Expense Reserves	Indemnity Recoveries	Total Incurred
LOB: Auto Physical Damage									
Coverage: Auto Physical Damage Collision									
Woodsboro ISD	196902-00401			6,356.53	182.00	0.00	0.00	0.00	6,538.53
Coverage Subtotals	0	1	0	0 6,356.53	182.00	0.00	0.00	0.00	6,538.53
LOB Subtotal	0	1	0	0 6,356.53	182.00	0.00	0.00	0.00	6,538.53
				Sand Tatal for Fataur					
			G	Grand Total for Enter	prise				
Claim Counts			Loss	Expense	Loss	Expense Inc	demnity	Total	

lotai	Indemnity	⊨xpense	Loss	Expense	Loss				
Incurred	Recoveries	Reserves			Payments	No Status	Denied	Closed	Open
6,538.53	0.00	0.00	0.00	182.00	6,356.53	0	0	1	0

Claim counts reflect total number of unique claim ID's.

Claim counts reflect total number of unique claim ID's.

Claim Statuses as of 11-30-2022

Open Closs 902-00302 0	1 1	Denied No Stat	us Payme	poss Expense Payments Payments	Reserves	Expense Reserves	Indemnity Recoveries	Total Incurred
0	·	0		.00 0.00	0.00			
0	·	0		.00 0.00	0.00			
0	·	0		.00 0.00	0.00			
	·	0			0.00	0.00	0.00	0.00
0	4		0 0	0.00	0.00	0.00	0.00	0.00
	•	0	0 0	.00 0.00	0.00	0.00	0.00	0.00
902-00301			0	0.00	0.00	0.00	0.00	0.00
0	1	0	0 0	0.00	0.00	0.00	0.00	0.00
0	1	0	0 0	.00 0.00	0.00	0.00	0.00	0.00
902-00501				,				22,923.00
0	1	0	0 0	.00 22,923.00	0.00	0.00	0.00	22,923.00
0	1	0	0 0	.00 22,923.00	0.00	0.00	0.00	22,923.00
			Grand Total for E	nterprise				
		Loss	Expense	Loss	Evnense Indo	mnity	Total	
tus		Payments	Payments	Reserves	•	-	Incurred	
0		0.00	22,923.00	0.00	0.00	0.00	22,923.00	
	02-00501 0 0	02-00501 0 1 0 1	02-00501 0 1 0 0 1 0 Loss Payments	02-00501 0. 0 1 0 0 0. Grand Total for Education Serves to the serves of the serves o	02-00501	02-00501	02-00501	02-00501

Claim counts reflect total number of unique claim ID's.

Claim Statuses as of 11-30-2022

Woodsboro ISD										
Line of Business / Coverage	Open (Closed	Denied	No Status	Loss Payments	Expense Payments	Loss Reserves	Expense Reserves	Indemnity Recoveries	Total Incurred
LOB: Auto Physical Damage										
Coverage: Auto Physical Damage Collision										
Woodsboro ISD	196902-0020	2			2,416.92	0.00	0.00	0.00	0.00	2,416.92
Coverage Subtotals	0	1	0	0	2,416.92	0.00	0.00	0.00	0.00	2,416.92
Coverage: Auto Physical Damage Comprehensive										
Woodsboro ISD	196902-0010	1			128.65	0.00	0.00	0.00	0.00	128.65
Coverage Subtotals	0	1	0	0	128.65	0.00	0.00	0.00	0.00	128.65
LOB Subtotal	0	2	0	0	2,545.57	0.00	0.00	0.00	0.00	2,545.57
LOB: Auto										
Coverage: AUTO Property Damage										
Mexia ISD	196902-0020				4,942.35	158.30	0.00	0.00	0.00	5,100.65
Enterprise Rent-a-Car	196902-0020	3			5,550.96	0.00	0.00	0.00	0.00	5,550.96
Coverage Subtotals	0	2	0	0	10,493.31	158.30	0.00	0.00	0.00	10,651.61
LOB Subtotal	0	2	0	0	10,493.31	158.30	0.00	0.00	0.00	10,651.61
				Grar	nd Total for Enterp	orise				
					,					
Claim Counts				Loss	Expense	Loss	Expense Inc	demnity	Total	
Open Closed Denied	No Status		Pay	ments	Payments			overies	Incurred	
0 4 0	0		13,0	38.88	158.30	0.00	0.00	0.00	13,197.18	

Print Date: 10/17/2022

Loss Run Dated - 09/30/2022

CPAT Woodsboro ISD Account No: 426399

Policy Term: 03/01/2017 -- 03/01/2020

Policy Numbers: 7DA3CM0003962-02 AMP7523279-03 AMR-42399-02 HAN-14081-02 MSP-13154-05

Broker Company: CRC Group

Date Of Loss	Status	Loss Paid	Expense Paid	Loss Reserve	Expense Reserve	Total Incurred
8/25/2017	CLOSED	\$4,392,418.92	\$116,898.43	\$0.00	\$0.00	\$4,509,317.35
Claim Type:		Property Claim				
Loss Type:		Wind; Named St	orm			
Loss Description	n:	Hurricane Harve	y - wind and rain			
Location:		Various				
CLM21119		4141561				
5/1/2019	CLOSED	\$13,186.62	\$3,938.96	\$0.00	\$0.00	\$17,125.58
Claim Type:		Property Claim				
Loss Type:		Vandalism / Mm				
Loss Description	n:	Broken window, Elementary of	6 windows in doc	ors, 2 doors, 3 desks	s with locks, 4 filing cabinets v	with locks, \$306.00 from
Location:		Woodsboro JR S	R CTE Building			
CLM29364		4168502				
Policy Total:		\$4,405,605.54	\$120,837.39	\$0.00	\$0.00	\$4,526,442.93

This is not to be construed as an absolute statement of claims, but as a history located for this insured with the listed policy numbers. The Amrisc, LLC loss runs do not necessarily reflect all new claims, transactions or changes applicable within the last 30 days.

Print Date: 10/17/2022

Account No: 804504

Loss Run Dated - 09/30/2022

CPAT Woodsboro ISD Account No: 715224

Policy Term: 03/01/2020 -- 03/01/2021

Policy Numbers: 10T029659-13249-20-00 AMP7523279-04 AMR-42399-03 CPP1186448-00 HAN-14081-03 LEX-

037041339-00 MSP-13154-06 ORAMPR008725-00 SSI-17720-00 USI-26477-00

Broker Company: CRC Group

No Claims found for this policy

CPAT Woodsboro ISD

Policy Term: 03/01/2021 -- 03/01/2022

Policy Numbers: 10T029659-13249-21-01 AMP7523279-05 AMR-42399-04 CPP1186448-01 GVS-11017-00 HAN-

14081-04 LEX-037041339-01 MSP-13154-07 ORAMPR008725-01 TSAMPR0000489-00 USI-

26477-01

Broker Company: CRC Group

No Claims found for this policy

This is not to be construed as an absolute statement of claims, but as a history located for this insured with the listed policy numbers. The Amrisc, LLC loss runs do not necessarily reflect all new claims, transactions or changes applicable within the last 30 days.

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CPAT Woodsboro ISD Account No: 913128

Policy Term: 03/01/2022 -- 03/01/2023

Policy Numbers: AMP7523279-06 AMR-42399-05 CPP1186448-02 GVS-11017-01 HAN-14081-05 LEX-037041339-

02 MSP-13154-08 ORAMPR008725-02 TSAMPR0000489-01 USI-26477-02

Broker Company: CRC Group

No Claims found for this policy

 Loss Paid
 Expense Paid
 Loss Reserve
 Expense Reserve
 Total Incurred

 Total All Years:
 \$4,405,605.54
 \$120,837.39
 \$0.00
 \$0.00
 \$4,526,442.93

This is not to be construed as an absolute statement of claims, but as a history located for this insured with the listed policy numbers. The Amrisc, LLC loss runs do not necessarily reflect all new claims, transactions or changes applicable within the last 30 days.

Woodsboro ISD Exhibit II

	Member		Bldg			Zip		#	YR	YR Roof			Cost/Sq.						
Member Name	Number	Building	#	Address	City	Code	Const	Story	Built	Built	Sprinklered	Sq. Ft.	Ft.	%	Source	Build	ling Value	Contents Value	Total Value
Woodsboro ISD	196-902	Administration Bldg	1A	408 Kasten	Woodsboro	78393	JM	1	2010			2,442	\$ 196.45	25%		\$	479,740	\$ 119,935	\$ 599,675
Woodsboro ISD	196-902	Junior High / High School	1B	508 Kasten	Woodsboro	78393	MNC	1	1960	2019		47,529	\$ 190.52	20%		\$!	9,055,092	\$ 1,811,018	\$ 10,866,110
Woodsboro ISD	196-902	Band Hall	1C	408 S Kasten	Woodsboro	78393	MNC	1	2021	2021		4,550	\$ 217.75	20%		\$	990,775	\$ 198,155	\$ 1,188,930
Woodsboro ISD	196-902	Multi-Purpose Dome (Gym)	1D	904 Locke	Woodsboro	78393	FR	1	2011			18,869	\$ 207.40	10%		\$:	3,913,492	\$ 391,349	\$ 4,304,841
Woodsboro ISD	196-902	1954 Gymnasium	1E	908 Locke	Woodsboro	78393	MNC	1	1954			17,557	\$ 149.26	10%		\$:	2,620,606	\$ 262,061	\$ 2,882,667
Woodsboro ISD	196-902	Wood Shop	1F	510 S Kasten	Woodsboro	78393	MNC	1	1966	2020		3,240	\$ 160.55	10%		\$	520,192	\$ 52,019	\$ 572,211
Woodsboro ISD	196-902	Welding Shop	1G	510 S Kasten	Woodsboro	78393	MNC	1	1966			1,953	\$ 152.09	25%		\$	297,027	\$ 74,257	\$ 371,284
Woodsboro ISD	196-902	Weight Room	11	401 S Sixth	Woodsboro	78393	NC	1	1997			2,601	\$ 102.04	10%		\$	265,394	\$ 26,539	\$ 291,933
Woodsboro ISD	196-902	5th & 6th Grade	1K	205 S Myrtle	Woodsboro	78393	JM	1	1966			9,027	\$ 143.29	16%		\$	1,293,487	\$ 206,958	\$ 1,500,445
Woodsboro ISD	196-902	Elementary/Cafeteria	1L	205 S Myrtle	Woodsboro	78393	MNC	1	1955			32,927	\$ 190.79	16%		\$ (6,282,148	\$ 1,005,144	\$ 7,287,292
Woodsboro ISD	196-902	Elementary South Wing	1M	205 S Myrtle	Woodsboro	78393	MNC	1	1982	2020		4,470	\$ 176.84	16%		\$	790,477	\$ 126,476	\$ 916,953
Woodsboro ISD	196-902	Elementary Gymnasium	1N	205 Myrtle	Woodsboro	78393	MNC	1	1986	2020		4,150	\$ 147.51	10%		\$	612,178	\$ 61,218	\$ 673,396
Woodsboro ISD	196-902	Bus Barn	10	810 W Myrtle	Woodsboro	78393	NC	1	1985	2020		6,560	\$ 49.02	10%		\$	321,557	\$ 32,156	\$ 353,713
Woodsboro ISD	196-902	Maintenance Storage	1P	812 S Myrtle	Woodsboro	78393	NC	1	1986	2020		1,584	\$ 67.06	10%		\$	106,217	\$ 10,622	\$ 116,839
Woodsboro ISD	196-902	Jr/Sr CTE Classrooms	1Q	510 S Kasten	Woodsboro	78393	JM	1	2016	2016		3,430	\$ 145.01	18%		\$	497,388	\$ 89,530	\$ 586,918
Woodsboro ISD	196-902	Athletic Field House w/ Weight Room	1R	401 S Sixth	Woodsboro	78393	FR	1	2017	2016		7,296	\$ 217.62	15%		\$	1,587,722	\$ 238,158	\$ 1,825,880
Woodsboro ISD	196-902	Concession/Restroom/Ticket Booth	15	401 S Sixth	Woodsboro	78393	JM	1	2017	2016		2,075	\$ 146.18	15%		\$	303,323	\$ 45,498	\$ 348,821
Woodsboro ISD	196-902	Early Childhood Dome	1T	503 S Myrtle	Woodsboro	78393	FR	1	2017	2016		8,170	\$ 194.00	15%		\$	1,584,955	\$ 237,743	\$ 1,822,698
Woodsboro ISD	196-902	Girl's Field House	1U	401 S Sixth	Woodsboro	78393	MNC	1	1975	2021		3,131	\$ 191.63				600,000	\$ 75,000	\$ 675,000
Woodsboro ISD	196-902	Mechanical Building (Boiler/Chiller)		205 S Myrtle	Woodsboro	78393	NC	1	1985			418	\$ 48.00	10%		\$	20,064	\$ 2,006	\$ 22,070
Woodsboro ISD	196-902	Stadium Concession / Shade Shelter		401 S Sixth	Woodsboro	78393	JM	1	1966	2020		630	\$ 40.00			\$	25,200	\$ -	\$ 25,200
Woodsboro ISD	196-902	Stadium Press Box		401 S Sixth	Woodsboro	78393	Frame	1				216	\$ 30.00	10%		\$	6,480	\$ 648	\$ 7,128
Woodsboro ISD	196-902	Stadium Bleachers (Home)		401 S Sixth	Woodsboro	78393										\$	132,267	\$ -	\$ 132,267
Woodsboro ISD	196-902	Stadium Bleachers (Visitor)		401 S Sixth	Woodsboro	78393										\$	96,600	\$ -	\$ 96,600
Woodsboro ISD	196-902	Stadium Poles (6) /Lights (48)		401 S Sixth	Woodsboro	78393										\$	93,600	\$ -	\$ 93,600
Woodsboro ISD	196-902	Stadium Track		401 S Sixth	Woodsboro	78393										\$	450,000	\$ -	\$ 450,000
Woodsboro ISD	196-902	Tennis Courts (4) w/ Fencing		508 Kasten	Woodsboro	78393										\$	150,000	\$ -	\$ 150,000
Woodsboro ISD	196-902	Tennis Poles (6) / Lights (16)		508 Kasten	Woodsboro	78393										\$	13,000	\$ -	\$ 13,000
Woodsboro ISD	196-902	Tennis Restrooms		508 Kasten	Woodsboro	78393	Frame	1				180	\$ 15.00	5%		\$	2,700	\$ 135	\$ 2,835
Woodsboro ISD	196-902	Baseball Bleachers A (28' x 5 rows)		201 S Kasten	Woodsboro	78393										\$	9,333	\$ -	\$ 9,333
Woodsboro ISD	196-902	Baseball Bleachers B (15' x 4 rows)		201 S Kasten	Woodsboro	78393										\$	4,000	\$ -	\$ 4,000
Woodsboro ISD	196-902	Baseball Bleachers C (15' x 4 rows)		201 S Kasten	Woodsboro	78393										\$	4,000	\$ -	\$ 4,000
Woodsboro ISD	196-902	Baseball Dugout Home (9 x 35)		201 S Kasten	Woodsboro	78393						315	\$ 25.00			\$	7,875	\$ -	\$ 7,875
Woodsboro ISD	196-902	Baseball Dugout Visitor (9 x 35)		201 S Kasten	Woodsboro	78393						315	\$ 25.00			\$	7,875	\$ -	\$ 7,875
Woodsboro ISD	196-902	Baseball Press Box (7 x 10)		201 S Kasten	Woodsboro	78393						70	\$ 30.00			\$	2,100	\$ -	\$ 2,100
Woodsboro ISD	196-902	Baseball Storage Shed (9 x 12)		201 S Kasten	Woodsboro	78393						108	\$ 30.00			\$	3,240	\$ -	\$ 3,240
Woodsboro ISD	196-902	Baseball Scoreboard		201 S Kasten	Woodsboro	78393										\$	15,000	\$ -	\$ 15,000
Woodsboro ISD	196-902	Baseball Batting Cage (8 x 35)		201 S Kasten	Woodsboro	78393						280	\$ 20.00			\$	5,600	\$ -	\$ 5,600
	•				•	•									Totals	\$ 33	3,170,704	\$ 5,066,625	\$ 38,237,329

Woodsboro ISD Exhibit III

	Member	Vehicle								Comp		Collision	District Unit
Member Name	Number	Number	Year	Make	Model	Vin Number	Class	C	ost New	Dedu	ctible	Deductible	Number
Woodsboro ISD	196-902	1	2005	Chevrolet	PU	9858	014990	\$	26,000	\$	1,000	\$ 1,000	1/2 ton
Woodsboro ISD	196-902	2	1995	Ford	F350 PU	3632	014990						White Van
Woodsboro ISD	196-902	3	2006	International	Bus	8316	618400	\$	71,000	\$	1,000	\$ 1,000	1
Woodsboro ISD	196-902	4	1994	Wells Cargo	Trailer	4478	694990						
Woodsboro ISD	196-902	5	2007	Chevrolet	Bus	8843	618300	\$	50,000	\$	1,000	\$ 1,000	7
Woodsboro ISD	196-902	6	2008	GMC	Bus	1818	618200	\$	50,000	\$	1,000	\$ 1,000	Activity Bus A
Woodsboro ISD	196-902	7	2012	Thomas	Freightliner	4UZABRDT9CCBC9004	618400	\$	96,323	\$	1,000	\$ 1,000	9
Woodsboro ISD	196-902	8	2012	Thomas	Freightliner	4UZABRDTOCCBC9005	618400	\$	96,333	\$	1,000	\$ 1,000	8
Woodsboro ISD	196-902	9	2013	Chevrolet	Suburban	1GNSC5EOXDR140734	014990	\$	32,545	\$	1,000	\$ 1,000	Α
Woodsboro ISD	196-902	10	2013	Chevrolet	Suburban	1GMSC5EP3DR139134	014990	\$	32,545	\$	1,000	\$ 1,000	В
Woodsboro ISD	196-902	11	2015	Chevrolet	PU	1GC0CUEG6FZ111578	014990	\$	25,300	\$	1,000	\$ 1,000	3/4 ton
Woodsboro ISD	196-902	12	2014	Chevrolet	Van	1GNSGCF48E1203372	014990	\$	32,795	\$	1,000	\$ 1,000	
Woodsboro ISD	196-902	13	2019	Chevrolet	Traverse	1GNERFKW1KJ159890	739800	\$	26,260	\$	1,000	\$ 1,000	
Woodsboro ISD	196-902	14	2019	Chevrolet	Suburban	1GNSCKEC5KR240813	014990	\$	39,988	\$	1,000	\$ 1,000	С
Woodsboro ISD	196-902	15	2017	Chevrolet	Activity	1GB3GRBG5H1345414	014990	\$	58,150	\$	1,000	\$ 1,000	Activity Bus B
Woodsboro ISD	196-902	16	2019	Freedom Trailer	Trailer	5WKBE1629L1063437	694990	\$	33,090	\$	1,000	\$ 1,000	Food Trailer
Woodsboro ISD	196-902	17	2020	International	Bus	4DRBUC8NXLB899162	618400	\$	102,259	\$	1,000	\$ 1,000	
Woodsboro ISD	196-902	18	2020	International	Bus	4DRBUC8N1LB899163	618400	\$	102,259	\$	1,000	\$ 1,000	Bus 11
Woodsboro ISD	196-902	19	2020	International	Bus	4DRBUC8N3LB899164	614800	\$	102,259	\$	1,000	\$ 1,000	Bus 12

Exhibit IV

Property insurance companies requested (Choice 1, 2, 3...)

Choice	Company Name & Syndicate Number	Parent Name	Best Rating