



WESLACO

INDEPENDENT SCHOOL DISTRICT

319 W. Fourth Street/P.O. Box 266, Weslaco, Texas 78599-0266 (956) 969-6500

May 13, 2017

Weslaco Independent School District is accepting proposals for:

**Property & Casualty Insurance –
Boiler & Machinery, Property & Contents, Inland Marine and Flood
(RFP # 17-08-66)**

Sealed proposals are to be mailed or hand delivered to the attention of Andres Sanchez Jr., Assistant Superintendent for Business & Finance, Weslaco Independent School District, 312 W. Fifth Street, Weslaco, Texas 78596. Please mark your envelope plainly: **“Proposal for Property and Casualty Insurance (Proposal # 17-08-66), due date: Wednesday, August 2, 2017 at 3:00 p.m.”** Responses sent by overnight mail, please write proposal # on the delivery ticket.

Sealed proposals will be accepted until 3:00 p.m. on Wednesday, August 2, 2017, at which time they will be opened, but not read publicly, in the Office of the Assistant Superintendent for Business & Finance, 312 W. Fifth Street, Weslaco, Texas. Any proposals received late will be returned unopened. Weslaco ISD is not responsible for proposals misplaced or mailed incorrectly.

Please reply using the enclosed forms and do not re-write our forms. Please submit an original and two (2) copies of your proposal response. Administrative Offices will be closed on Fridays through August 7th. District offices will also be closed July 14th through July 31st.

The awarding of the proposal will take place at a public school board meeting. The Board of Education reserves the right to accept, reject any and /or all proposals, waive minor technicalities, or to award the proposal to the most responsible offeror which best serves the interest of the District.

Please fill out, sign and submit with your proposal response the enclosed IRS Form W-9 and Conflict of Interest Questionnaire. Please notify the District of your intentions to submit a proposal by completing and faxing to us the “Response Sheet” located at the end of this proposal (page 42) to fax # 956-969-6910..

We look forward to hearing from you.

Sincerely,

- Original Signed -

Dr. Priscilla Canales PhD.
Superintendent

- Original Signed -

Andres Sanchez Jr., CPA
Assistant Superintendent for Business & Finance

Enclosures

WESLACO INDEPENDENT SCHOOL DISTRICT

Property and Casualty Insurance (Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)

PROPOSAL PACKAGE CHECKLIST REMINDER

IN ORDER FOR YOUR PROPOSAL TO BE CONSIDERED IN THE PROPOSAL PROCESS, THE FOLLOWING ITEMS ARE REQUIRED TO BE INCLUDED IN THE PROPOSAL PACKAGE:

| DESCRIPTION OF ITEM | YES | NO | N/A |
|---|-------|-------|-------|
| 1. STANDARD TERMS & CONDITIONS, GENERAL PROPOSAL & ASSUMPTIONS BACKGROUND (Pages 3-4). | _____ | _____ | _____ |
| 2. FELONY CONVICTION NOTIFICATION (Fill in one of the appropriate sections – A, B, or C, Page 5). | _____ | _____ | _____ |
| 3. PROPOSAL SPECIFICATION REQUIREMENT FORM (Page 6) | _____ | _____ | _____ |
| 4. PROPOSAL FORMS pertaining to this proposal Should have all lines filled in as needed. | _____ | _____ | _____ |
| 5. NON-COLLUSION STATEMENT & SIGNATURE SHEET (Page 8) | _____ | _____ | _____ |
| 6. PLEASE SUBMIT THE WHOLE PACKAGE EVEN IF NOT SUBMITTING A PROPOSAL ON ALL ITEMS. | | | |

**** (FAILURE TO MANUALLY SIGN THE PROPOSAL WILL DISQUALIFY IT.)****

WESLACO INDEPENDENT SCHOOL DISTRICT

Property and Casualty Insurance (Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)

STANDARD TERMS AND CONDITIONS NOTICE TO OFFERORS

ITEMS BELOW APPLY TO AND BECOME A PART OF TERMS
AND CONDITIONS OF PROPOSALS UNLESS SUPERCEDED BY ANY ATTACHED
TERMS AND SUPPLEMENTAL CONDITIONS OR SPECIFICATIONS
IN WHICH CASE ATTACHED CONDITIONS WILL PREVAIL

ANY EXCEPTIONS MUST BE IN WRITING

1. Proposals should be submitted on this form. Each proposal shall be placed in a separate envelope, sealed and properly identified with the proposal title, proposal number, date, and time to be opened.
2. Proposal shall follow the plan as specified. Answer all the yes and no questions and fill in the blanks.
3. Proposals must be received in the Business Department Office before the hour and date specified. Late proposals will not be considered under any circumstances.
4. Proposals must have original signatures.
5. Proposal prices must be firm for acceptance for **ninety (30) days** from proposal opening date. No proposals may be withdrawn without written approval after a contract has been signed or partial performance of the proposal agreement has begun.
6. **Failure to manually sign proposal will disqualify it.** Person signing proposal should show title or authority to bind their firm into a contract.
7. The District reserves the right to accept or reject all or any part of any proposal, waive minor technicalities, and award the proposal to best serve the interest of the District.
8. **Term of Contract:** The contract will be effective as per Insurance Policies, or after Board approval, whichever occurs later. The district would like to enter into a one-year contract with the option to renew for two (2) additional (separate) one year contract renewals if there are no changes in the insurance rates, terms, and conditions.
9. **Venue:** In the event of legal disputes related to this contract, the venue shall be Hidalgo County in the State of Texas.

Proposal Number

Date

Company Name

WESLACO INDEPENDENT SCHOOL DISTRICT

Property and Casualty Insurance (Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)

GENERAL PROPOSAL REQUIREMENTS & ASSUMPTION BACKGROUND

1. Sealed proposals will be accepted until 3:00 p.m. on Wednesday, August 2, 2017, at which time they will be opened. **Proposals will be opened, but not read publicly** in the Office of the Assistant Superintendent for Business & Finance, 312 W. Fifth Street, Weslaco, Texas. Any proposals received late will be returned unopened. Weslaco ISD is not responsible for proposals misplaced or mailed incorrectly. All inquiries regarding this proposal should be made in writing, via email to Michael De La Rosa, Director of Employee Benefits & Risk Management at mgdelarosa@wisd.us with a copy to Baldemar Garcia, Director of Purchasing at bgarcia@wisd.us.

2. The original plus one copy of sealed proposals are to be mailed or hand delivered to the attention of:

Andres Sanchez Jr., CPA
Assistant Superintendent for Business & Finance
Weslaco ISD
312 W. Fifth St.
Weslaco, Texas 78596

3. Proposed effective date as per specified insurance policies inception dates (September 1, 2017), or after approval by the School Board, whichever occurs later.

4. Weslaco ISD would like to enter into a one-year contract with the option to renew for two (2) additional (separate) one (1) year terms, if there are no changes in terms and conditions, insurance agent or underwriting company, and the insurance rates do not increase more than 10- 15 % per year.

5. A minimum of 90 days advance notice must be provided to the District concerning any subsequent adjustment to premium rates or fees.

6. Please return the original proposal forms in the same order received with the yes or no questions answered and fill in the blanks. This will make it a lot easier to analyze the proposal. This is to the Benefit of both parties.

“The Weslaco ISD Board of Trustees shall retain the right to select the agent(s) or agencies of its choice pertaining to this Request for Proposals. A statement of agent or agencies qualifications shall include: contact information (address, phone numbers, facsimile numbers, and email), services to be provided, years in business and a copy of the proper Texas Department of Insurance license to perform the service. A statement of qualifications should be submitted along with the Property & Casualty Insurance proposal response or in separate binder marked Agent Information - Property & Casualty Insurance Proposal # 17-08-66, which will be considered for purposes of agent(s) or agency related to this RFP.”

WESLACO INDEPENDENT SCHOOL DISTRICT

Property and Casualty Insurance (Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)

FELONY CONVICTION NOTIFICATION

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, 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, BUT THE COMPANY REPRESENTATIVE MUST CHECK OFF A SELECTION BELOW (A, B, OR C)

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 furnished is true to the best of my knowledge.

VENDOR NAME: _____

AUTHORIZED COMPANY OFFICIALS' NAME (PRINTED) AND SIGNATURE

Name: _____

Signature: _____

DATE: _____

******* PLEASE CHECK OFF A SELECTION BELOW *******

() A. My firm is a publicly held corporation, therefore, this reporting requirement is not applicable.

() B. My firm is not owned and/or operated by anyone who has been convicted of a felony.

() C. My firm is owned or operated by the following individual(s) who has/have been convicted of a felony:

Name of Felon: _____

Details of Convictions(s): _____

WESLACO INDEPENDENT SCHOOL DISTRICT

Property and Casualty Insurance (Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)

PROPOSAL SPECIFICATIONS REQUIREMENTS

(TO BE FILLED IN BY OFFEROR AND SUBMITTED WITH PROPOSAL)

Is this proposal in conformance with the enclosed specifications?

Yes _____ No _____

If the answer is no, offeror must identify and explain each exception taken, with reference to each page and paragraph to which the exception will apply.

It should be understood that if no exception is taken the vendor should supply all items as specified at the time of sale. Failure to indicate any difference in products offered or proposed in this proposal may be deemed sufficient grounds of a vendor proposal.

Comments: _____

Date

Company Name

WESLACO INDEPENDENT SCHOOL DISTRICT

It is the intent of these specifications to secure proposals for:

**Property and Casualty Insurance (Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)**

For further information, please submit questions via email to:

Baldemar Garcia
Director of Purchasing
Weslaco Independent School District
312 W. Fifth Street
Weslaco, Texas 78596
Phone (956) 969-6596
bgarcia@wisd.us

and

Michael De La Rosa
Director of Risk Management
Weslaco Independent School District
319 W. Fourth Street
Weslaco, Texas 78596
Phone (956) 969-6580
mgdelarosa@wisd.us

According to the Texas Education Code, Subchapter B, Section 44.031 (b), in determining to whom to award a contract, the district will consider the following:

- (1) the purchase price;
- (2) the reputation of the vendor and of the vendor's goods or services;
- (3) the quality of the vendor's goods or services;
- (4) the extent to which the goods or services meet the district needs;
- (5) the vendor's past relationship with the district
- (6) the impact on the ability of the district to comply with laws and rules relating to historically underutilized business (NOT APPLICABLE);
- (7) the total long-term cost to the district to acquire the vendor's goods or services (NOT APPLICABLE); and
- (8) any other relevant factor specifically stated in the request for bids or proposals.

WESLACO INDEPENDENT SCHOOL DISTRICT

Property and Casualty Insurance (Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)

NON-COLLUSION STATEMENT & SIGNATURE SHEET

The undersigned affirms that he/she is duly authorized to execute this contract, that this company, corporation, firm, partnership or individual has not prepared this proposal in collusion with any other Offeror, and that the contents of this proposal as to prices, terms or conditions of said proposal have not been communicated by the undersigned nor by any employee or agent to any other person engaged in this type of business prior to the official opening of this proposal.

Further, I affirm that prior to or after the opening of this proposal, I (or any representative of my company) will not discuss the contents of this proposal with any person affiliated with Weslaco ISD, other than the Chief Executive Director of Business Operations or his Weslaco ISD Designee prior to the awarding of this proposal. I understand that failure to observe this procedure may cause my proposal to be rejected.

I also affirm that no officer or stockholder of the offeror (bidder) is a member of the staff, or related to any employee of the Weslaco ISD except as noted herein _____.

By signing this proposal, vendor makes the assurance that vendor has not been debarred or suspended from conducting business with the U. S. Government according to Executive Order 12549 entitled "Debarment and Suspension."

I, _____, have read the general proposal requirements and assumptions background (page 4), proposal specification requirements (page 6), I fully understand them, and will fully execute them if I am awarded this proposal.
(Print/Type Name of Company Officer)

I have represented the truth concerning the felony conviction notification. **I have checked off one of the three statements on page 5, and have signed the form.**

I fully understand the proposal specifications (pages 2-8).

COMPANY _____ EMPLOYER I. D. No. _____

ADDRESS _____

CITY, STATE, ZIP CODE _____

AREA CODE/TELEPHONE/FAX _____ EMAIL _____

SIGNATURE

TITLE

DATE

***The signing of this page indicates understanding and acceptance of this proposal's terms and conditions.**

WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, and Inland Marine)
(Proposal # 17-08-66)**

SECTIONS

- I. **SECTION A - SELECTION OF AGENTS & INSURANCE COMPANY**

- II. **SECTION B - BOILER & MACHINERY COVERAGE**

- III. **SECTION C – PROPERTY BUILDING & CONTENTS**

WESLACO INDEPENDENT SCHOOL DISTRICT

Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)

GENERAL INFORMATION ON DISTRICT

Name Insured: Weslaco Independent School District

Address: 312 W. Fifth Street, P.O. Box 266
Weslaco, Texas 78599-0266

Legal Status: Public School

Business or Operations: School District – Direct operation and administration of Public Schools

Date Organized: 1920's

Currently Accredited: Yes, by Texas Education Agency

School Board Information

Number of Members: Seven (7) members selected by election

Term of Office: Four (f) years staggered terms

Total Number of

a) Faculty/Teachers (full time) 1,084

b) Substitutes 408

c) Counselors/Psychologist 46

d) Administrators 162

e) Nurses 17 RN's

f) Non-Professional Staff 1,024 (excluding substitutes)

g) # of Employees w/Money Handling 4

Enrollment

a) High School Students (9-12) 4,776

b) Middle School (6-8) 3,904

c) Elementary (Pre-K 4 – 5) 9,192

d) Total 17,228

Expected Enrollment for 2017-2015 17,974

Number of Stadiums 2

Number of Grandstands or Bleachers – Seating Capacity by sports and schools

Weslaco High School (WHS)

Weslaco East High School (WEHS)

| | <u>WHS</u> | <u>WEHS</u> |
|-------------------|------------|-------------|
| Football | 13,500 | 1,400 |
| Baseball | 600 | 400 |
| Softball | 300 | 400 |
| Basketball (Gym) | 2,000 | 2,300 |
| Basketball (Gym2) | 800 | 500 |

Audits are made annually by independent auditors.

WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance\
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)**

SECTION A

SELECTION OF AGENT & INSURANCE COMPANY

WESLACO INDEPENDENT SCHOOL DISTRICT

Property and Casualty Insurance (Boiler & Machinery, Property & Contents, Inland Marine and Flood) (Proposal # 17-08-66)

SELECTION OF AGENT AND INSURANCE COMPANY

SELECTION

- The District based on coverage afforded reasonably will make selection of agent and carrier anticipated net premiums, insurance company financial condition and reputation, and other services.
- The agent also will be expected to provide miscellaneous forms of coverage, such as, but not limited to bonds, crime, and flood coverage. The policies may be reviewed by the District for competitiveness.
- Agents will be required to meet all federal and state insurance regulations concerning the coverage submitted, including, but not limited to, laws governing the use of surplus lines companies and the use of forms that are not filed in Texas.
- Boiler and Machinery, Property & Contents, Inland Marine and Flood may be awarded individually to separate vendors. One vendor could be awarded all coverages. Package policies are acceptable. **Proposals will be awarded in the way that is in the best interest of the District.**
- The District has reviewed its values periodically with the current insurance carrier in connection with its current program. The replacement values are updated, using current replacement costs incurred in the construction of new buildings.

UNDERWRITING INFORMATION

- Proposals shall be based on the underwriting information (if any) furnished in these specifications and / or applications, and the information contained therein is believed to be substantially correct. The ultimate responsibility, however, for determining the full extent of the exposures and the verification of information rests solely on the offeror selected.
- The District, its employees and representatives will not be responsible for any errors and omissions in these specifications nor for the failure on the part of the offeror to determine the full extent of the exposures.
- If inspections or further information regarding risk identifications are required, please contact Michael De La Rosa, Director of Risk Management, at (956) 969-6580.
- **Loss data is presented in the best form available from the insurer.**

WESLACO INDEPENDENT SCHOOL DISTRICT

SELECTION OF AGENT AND INSURANCE COMPANY

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents and Inland Marine)
(Proposal # 17-08-66)**

COMPANY ELIGIBILITY

- All proposals must include the name of the insurance company. Each company if applicable, must have a general policyholder's rating of A- or better and financial rating of Class VIII or better as published by the A.M. Best Company, Inc., in the latest edition of its Key Rating Guide. The insurance company should be authorized to do business in the State of Texas.
- Mutual companies are eligible. All proposed policies must be non-assessable.

PROPOSAL

- Proposals are to be submitted in accordance with these specifications. Any restrictions, deviations, or other modifications with either restricted or broader coverage should be noted in the proposals. In the absence of notification of these modifications, companies will be held to the specifications.

QUALIFICATIONS OF AGENTS

- The recording agent must have been licensed to conduct fire and casualty insurance business in Texas for the past three years.
- The agency must be producing a minimum annual gross fire and casualty premiums of at least \$500,000 average for each of the past three years.
- The agency must maintain an errors and omissions policy with a minimum \$ 2,000,000 annual aggregate limit. If requested, the agency must provide a certificate of such coverage.
- The agency must provide a listing of a minimum of 5 currently insured school districts and provide the phone number and contact information for each.

AUTHORIZED PROPOSALS ONLY

Each proposal shall bear evidence of being an authorized proposal of the insurance company. The District reserves the right to assess the validity of the evidence submitted.

WESLACO INDEPENDENT SCHOOL DISTRICT

SELECTION OF AGENT AND INSURANCE COMPANY

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents and Inland Marine)
(Proposal # 17-08-66)**

SELECTION CRITERIA QUESTIONNAIRE

Name of recording agency. _____

1. Has the recording agent been licensed to conduct fire and casualty insurance in Texas for the past three (3) years? Yes _____ No _____
2. Has the agency produced minimum annual gross fire and casualty premiums income of at least \$500,000 average for each of the past three (3) years. Yes _____ No _____
3. Does the agency maintain an Errors and Omissions Policy with a minimum limits of at least \$2,000,000 annual aggregate with a Yes _____ No _____
4. Do you acknowledge that unless you have specifically made comments otherwise, you will be held to strict compliance with the specifications requested? Yes _____ No _____
5. Does this proposal include any engineering and inspection services? Yes _____ No _____

If yes, briefly describe the services and outline their cost.

WESLACO INDEPENDENT SCHOOL DISTRICT

SELECTION OF AGENT AND INSURANCE COMPANY

Property and Casualty Insurance (Boiler & Machinery, Property & Contents, Inland Marine and Flood) (Proposal # 17-08-66)

6. Does your proposal include property appraisal services? Yes _____ No _____

If yes, briefly describe the services and outline their cost.

7. Does the proposal include the services of an Accident Reconstructionist, local claims handlers, private investigators, etc.? Yes _____ No _____

If yes, please describe and outline costs.

8. Does the agency or carrier have an aggressive loss control program? Yes _____ No _____

If yes, how often does the safety management consultant visit the insured properties?

9. Will the carrier provide monthly loss runs? Yes _____ No _____

10. Are there any other services you provide? Yes _____ No _____

If yes, please describe and outline costs.

WESLACO INDEPENDENT SCHOOL DISTRICT

SELECTION OF AGENT AND INSURANCE COMPANY

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)**

SELECTION CRITERIA QUESTIONNAIRE

13. Explain the claims settlement procedures.

14. Are there any recommendations or suggestions you can make? Yes _____ No _____
If yes, please list.

15. Do you certify that the qualifications listed in the specifications are met? Yes _____ No _____

16. If requested, would you submit a certificate of Errors and Omissions Liability Insurance? Yes _____ No _____

WESLACO INDEPENDENT SCHOOL DISTRICT

SELECTION OF AGENT AND INSURANCE COMPANY

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)**

SELECTION CRITERIA QUESTIONNAIRE

17. Will your claims department be able to provide an acknowledgement Yes _____ No _____
of receipt of a claim within 7 days, an initial report within the
first 15 days and a status report every 30 days from receipt of the
claim?
18. Does your Agency currently insure a minimum of 5 Texas School Yes _____ No _____
Districts for Property and Casualty insurance coverage?

Signature

Date

Insurance Company _____

WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)**

SECTION B

BOILER & MACHINERY COVERAGE

WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)**

BOILER & MACHINERY COVERAGE

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WESLACO INDEPENDENT SCHOOL DISTRICT

Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)

BOILER AND MACHINERY COVERAGE

PRESENT BOILER AND MACHINERY COVERAGE

COVERAGE

LIMITS

Carrier

Travelers

See Attached Declaration Page

WESLACO INDEPENDENT SCHOOL DISTRICT

BOILER AND MACHINERY COVERAGE

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine, and Flood)
(Proposal # 17-08-66)**

DESIRED BOILER AND MACHINERY COVERAGE

Inception Date: September 1, 2017

Expiration Date:

The School District would prefer a one year contract with the option to extend the contract for up to two (2) one-year additional terms, if there are no changes in the terms and conditions and any increase in insurance rates are less than 10 - 15%.

Deductible: \$25,000

Alternative Deductibles will be considered

Sub-limits: Same as our current policy.

We are requesting similar coverage to include all machinery, switch gear, air handlers, chillers, boilers, and any other machinery generally considered a part of the current comprehensive forms. The School has no production machinery except in connection with the vocational programs such as mechanical shop.

Specimen Policy to be Submitted

Please enclose with your proposal a complete, legible specimen policy with all endorsements, riders, terms and conditions.

WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)**

BOILER AND MACHINERY COVERAGE

PROPOSED POLICY QUESTIONNAIRE

1. Does the proposed policy include comprehensive coverage of Property Limits? Yes _____ No _____
2. Does the proposed policy have an inception date of 9-1-14 Yes _____ No _____
3. Does the proposed policy include the following sub-limits?
 - Expediting Expense Limit (included), Limit - _____ Yes _____ No _____
 - Hazardous Substance & Pollution Clean up & Removal, Limit \$ 50,000 Yes _____ No _____
 - Water Damage Coverage, Limit, _____ Yes _____ No _____
4. Does the proposed policy provide for 60 days notice of cancellation, non-renewal, material change in policy terms, or conditions or premium? Yes _____ No _____
5. Will the form include broad definitions of machinery to include all machinery? Yes _____ No _____
6. Locations covered, but not limited to Location Schedule? Yes _____ No _____
7. Is a specimen of the policy included? Yes _____ No _____
8. Will the underwriter provide a Joint Loss Agreement? Yes _____ No _____

WESLACO INDEPENDENT SCHOOL DISTRICT

Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)

BOILER AND MACHINERY COVERAGE

PROPOSED POLICY QUESTIONNAIRE

9. What inspection and loss control services are included? Yes ____ No ____
10. Does the policy include repair or replacement coverage? Yes ____ No ____
11. Are business interruption and extra expenses included in the damage limit? Yes ____ No ____
12. Does your policy include Terrorist coverage as defined in the Terrorism Act of 2002? Yes ____ No ____

OTHER

1. Name of Insurance Company _____
2. What is the company's general policyholder's rating published in A.M. Best Company, Inc's latest edition of its Rating Guide? _____
3. What is the company's financial rating published in A.M. Best Company, Inc's latest edition of its Key Rating Guide? _____
4. Is the agent appointed to represent the insurance company? Yes ____ No ____
5. Have you provided evidence this is an authorized proposal? Yes ____ No ____

WESLACO INDEPENDENT SCHOOL DISTRICT

Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine, and Flood)
(Proposal # 17-08-66 – RE-BID)

BOILER AND MACHINERY COVERAGE

QUOTATION

Policy: Boiler & Machinery

Effective Dates: September 1, 2017 through August 31, 2015

COVERAGE

LIMITS

| | |
|-----------------------------|-------|
| Equipment Breakdown Limit | _____ |
| Property Damage | _____ |
| Business Damage | _____ |
| Extra Expense | _____ |
| Service Interruption | _____ |
| Spoilage (Perishable Goods) | _____ |
| Computer Equipment | _____ |
| Expediting Expense | _____ |
| Hazardous Substance | _____ |
| CFC Refrigerants | _____ |
| Newly Acquired Locations | _____ |
| Water Damage | _____ |
| Ammonia Contamination Limit | _____ |
| Terrorist Coverage | _____ |
| Deductible | _____ |

Proposed Premium 1) _____
2) _____
3) _____

WESLACO INDEPENDENT SCHOOL DISTRICT

Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)

BOILER AND MACHINERY COVERAGE

QUOTATION

Exact Name of Insurer: _____

Agency: _____

Describe payment plan. _____

Deviations from Specifications:

Please describe coverage deviations, restrictions, modifications, recommendations, not outlined in your answers above or provide any other information you feel is appropriate and will clarify or benefit the District.

Exact Name of Insurer: _____

Agency: _____

Describe Payment Plan. _____

Signature: _____

Date: _____

WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66 – RE-BID)**

SECTION C

PROPERTY BUILDINGS & CONTENTS

WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66 – RE-BID)**

PROPERTY BUILDING & CONTENTS

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WESLACO INDEPENDENT SCHOOL DISTRICT

Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)

PROPERTY INSURANCE

PRESENT PROPERTY INSURANCE PROGRAM

Carrier: Layered Policy through Am WINS Brokerage of Texas, Inc.

Type of Coverage: "All Risk" of direct physical loss, including theft of contents at replacement cost.

(Premiums Based on Present Values)

| | |
|---------------------|------------------------------|
| Building Values | \$ 339,793,876 |
| Other Structures | \$ 7,364,543 |
| Contents | \$ 47,984,230 |
| Total Values | <u>\$ 395,142,649</u> |

| | |
|--|---------------------------|
| Amounts of Insurance & Limits of Liability | Declared Value |
| Business & Personal Property | Blanket Coverage Included |
| Building Contents & Contents Deductible | \$ 100,000 |
| Basis of Loss Recovery | Replacement Cost |
| Coinsurance | 90% |
| Premium Paid | Annual |

See attachments for Statement of Value Spreadsheet and Current Property Declarations

WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66 – RE-BID)**

PROPERTY INSURANCE

PRESENT PROPERTY INSURANCE PROGRAM

The program includes all permanent buildings and their respective contents. It also includes portable buildings as well as ancillary structures such as light poles, fences, outbuildings, land and site improvement. A few locations may be inadvertently missing from the schedule and should be covered should loss occur. These locations would be subject to appropriate premium charge when discovered and limited to the current policy rate.

See Attachment for Detailed Property Coverage Declarations

WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)**

PROPERTY INSURANCE

DESIRED PROPERTY INSURANCE PROGRAM

| | |
|--|---|
| Blanket Limit Coverage on Buildings, Auxiliary Structures, and Contents | \$ 395,142,649 |
| Extra Expense Limit | \$ 500,000 |
| Deductible | Quote on above items \$ 50,000, 75,000 & 100,000 options |

*Preference will be given to quotes when deductibles apply per occurrence.

Inland Marine Section

- \$ 32,436 Lawn Equipment * \$ 1,000 Deductible
- \$ 446,27 Camera Equipment * \$ 1,000 Deductible
- \$ 1,500,000 Audio Visual Equipment \$ 1,000 Deductible
- \$ 1,500,000 Band Uniforms & Musical Instruments \$ 1,000 Deductible

EDP Section

- \$ 4,700,000 Computers and Electronic Equipment \$ 1,000 Deductible
including, servers, routers,
2-main frame systems, and other technology
equipment located in the Technology Department Building.

* See Schedules.

Inception Date 09-1-2017

Expiration Date The School District would prefer a one year contract with the option to extend the contract for two (2) one-year additional terms, if there are no changes in the terms and conditions and any increase in insurance rates are less than 10 - 15 %.

WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)**

PROPERTY INSURANCE

DESIRED PROPERTY INSURANCE PROGRAM

The successful offeror will be required to audit the schedule for completeness. The missing buildings, if any, are minor structures and do not materially affect the total values.

The program should cover all such structures and in effect, provide “errors and omissions.” That is, should a building be inadvertently missing, it will be covered nevertheless, and the premium will be subsequently charged.

Specimen Policy to be submitted:

Please enclose with your proposal a complete, legible specimen policy with all endorsements, riders, terms and conditions for any policy that is not a Texas Standard Form.

WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)**

PROPERTY INSURANCE

PROPOSED POLICY QUESTIONNAIRE

1. Is this proposal providing "All Risk" (including theft) coverage to the extent of, for example, the ISO form CP 10-30? Yes _____ No _____
2. Is the basis of recovery replacement cost new, both on building and contents? Yes _____ No _____
3. Is the blanket limit on buildings and auxiliary structures \$ 347,158,419 (New Value) See Schedule (Property Values & Locations) Yes _____ No _____
4. Is the blanket limit on contents \$ 47,984,230 See Schedule (Property Value & Locations) Yes _____ No _____
5. Do the Amounts of Insurance & Limits of Liability include the following?
\$ 50,000 Transit Custody/Carriers for hire, including "Portables" Yes _____ No _____
\$ 50,000 Transit insured vehicles Yes _____ No _____
6. Does the policy include an agreed amount clause on buildings and auxiliary structures? Yes _____ No _____
7. Does the policy include an agreed amount clause on contents? Yes _____ No _____
8. Are the premiums billed annually? Yes _____ No _____
9. Does the policy cover all buildings, contents, fences, poles, stadiums, structures, etc. even if inadvertently omitted from the schedule (subject to appropriate premium charge if needed)? Yes _____ No _____
10. Does the proposed policy have an inception Date of 09-01-14? Yes _____ No _____
2. Does the proposed policy provide for 60 days notice of cancellation, non-renewal, or material change in policy terms, conditions or premiums? Yes _____ No _____

WESLACO INDEPENDENT SCHOOL DISTRICT

Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)

PROPERTY AND CONTENTS INSURANCE

PROPOSED POLICY QUESTIONNAIRE

13. Has the specimen policy been submitted? Yes _____ No _____

14. THIS LINE WAS LEFT BLANK INTENTIONALLY.

15. Is newly acquired or constructed property covered? If so, how? Yes _____ No _____

Amount _____ # of Days _____

16. Will you provide coverage on buildings under construction when specifically requested? Yes _____ No _____

17. Will you cover builders risk and fire policy on student building trade projects? Yes _____ No _____

18. Does the proposal include demolition costs? Yes _____ No _____
Amount _____

19. Will you cover builders' risk insurance for new construction or major renovation? Yes _____ No _____

20. Does the proposal include a debris removal clause? Yes _____ No _____
Amount _____

21. Does the proposal include a limit of \$ 100,000 at any other location? Yes _____ No _____

22. Does the proposal include increased cost of construction due to the operation of building ordinances? Specify limits offered. Yes _____ No _____
Amount _____

WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)**

PROPERTY INSURANCE

PROPOSED POLICY QUESTIONNAIRE

23. Does the policy provide for fire department service charges? Yes _____ No _____
Amount \$ _____
24. Will you attach a joint loss agreement if the insurer is not the same as the Boiler and Machinery carrier? Yes _____ No _____
25. Does the policy include all portable and permanent buildings and their respective contents? Yes _____ No _____
26. Does your policy include Terrorist coverage as defined in the Terrorism Act of 2002? Yes _____ No _____

INLAND MARINE & EDP COVERAGE

1. Are you quoting our present Inland Marine and EDP Coverage Yes _____ No _____
2. Has a specimen of the policy been included? Yes _____ No _____
3. Does the policy include coverage for damage off premises, over 100 feet away? Yes _____ No _____
4. Would you include \$ 50,000 of transit coverage? Yes _____ No _____
5. Does coverage cover non-owner (rental) equipment? Yes _____ No _____

OTHER

1. Name of Insurance Company. _____
2. What is the company's general policyholder's rating published in A.M. Best Company, Inc.'s latest edition of its Key Rating Guide? _____
3. What is the company's financial rating published in A.M. Best Company, Inc.'s latest edition of its Key Rating Guide? _____
If not an A rated Co., provide the latest detail financials.
4. Is the agent appointed to represent the insurance company? Yes _____ No _____
5. Have you provided evidence this is an authorized proposal? Yes _____ No _____

WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)**

PROPERTY INSURANCE

PROPOSED POLICY QUESTIONNAIRE

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WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)**

PROPERTY INSURANCE

QUOTATION

Exact Name of Insurer: _____

Agency: _____

Describe payment plan. _____

Deviations from Specifications:

Please describe coverage deviations, restrictions, modifications, recommendations, not outlined in your answers above or provide any other information you feel is appropriate and will clarify or benefit the District. _____

If your proposal is not a standard form please outline the differences.

Signature: _____ Date: _____

WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)**

Camera Equipment Schedule

See Attachment

WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)**

Tractor Equipment

*****See Attachment*****

WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)**

For purposes of complying with the Texas Public Information Act (the “Act”), we are asking that VENDORS interested in submitting a response to a district’s request for bids, proposals or qualifications statements INCLUDE A STATEMENT (THIS FORM) STATING WHETHER NONE, ALL, OR SOME OF THE INFORMATION SUBMITTED WITH THEIR RESPONSES IS CONSIDERED BY THE COMPANY AS CONFIDENTIAL BECAUSE IT MEETS ONE OR MORE OF THE EXCEPTIONS LISTED IN THE ACT.

Failure by the company(s) to fill out and sign this form, will release Weslaco ISD of any liabilities in the event Weslaco ISD releases information included in their bids, proposals or qualifications statements responses as a result of complying with a request for public records under the Act.

If the Confidential Disclosure Statement is properly filed, and Weslaco ISD receives a request for public records under the Act related to such vendor’s response, Weslaco ISD will seek an opinion from the Texas Attorney General’s Office as required.

CONFIDENTIAL DISCLOSURE STATEMENT

This Confidential Disclosure Statement is being made by:

_____ to Weslaco ISD for the
(Vendor Name)

purpose of non-disclosure of various materials included in this package.

The rights and obligations of the parties with respect to such information are as follows:

1. “Disclosing Party” means a party that discloses Confidential Information under this Request.
“Receiving Party” means a party that receives Confidential Information under this Request.
2. “Confidential Information” means information of any kind which is obtained by Receiving Party from Disclosing Party relating to this *Request and which, by appropriate marking, is identified as confidential and proprietary at the time of disclosure.*
3. Notwithstanding the foregoing, Confidential Information shall not include any information that:
 - a) is publicly available prior to the Effective Date, or becomes publicly available thereafter through no breach of this Request by the Receiving Party;
 - b) was known to the Receiving Party prior to the date of disclosure or becomes known to the Receiving Party thereafter from a third party that has no obligation to Disclosing Party to keep such information confidential;
 - c) is independently developed by the Receiving Party without the benefit of Confidential Information of the Disclosing Party, as evidenced by written records; **or**

- d) must be produced by the Receiving Party pursuant to an order of a court of competent jurisdiction or a valid subpoena, provided that the Receiving Party promptly notifies the Disclosing Party and cooperates reasonably with the Disclosing Party's efforts to contest or limit the scope of such order.
- 4. The Receiving Party agrees that it will maintain the Confidential Information in confidence using a reasonable standard of care, and no less than the standard of care taken to protect its or his/her own confidential information, and will use such Confidential Information solely for the purposes of evaluating its or his/her interest in participating in a future Requests.
- 5. **As stated above, in the event Weslaco ISD receives a request for public records under the Act related to the vendor's response, Weslaco ISD will seek an opinion from the Texas Attorney General's Office as required.**
- 6. This Agreement shall not be construed as an obligation to enter into a Purchasing Agreement or any other subsequent relationship or agreement.

This Statement shall not be construed as an obligation to enter into a Purchasing Agreement or any other subsequent relationship or agreement.

_____ (vendor) wishes to have the following pages protected under this agreement and not be released to a third party. The following pages are not to be disclosed unless Weslaco ISD receives authorization via an opinion from the Texas Attorney General's Office:

- NONE of the Pages in this Request for Proposal is Confidential
- ALL Pages in this Request for Proposal are Confidential
- ONLY Pages _____ are labeled as Confidential

Name of Company or Firm: _____

By: _____ Title: _____

Signature: _____ Date: _____

WESLACO INDEPENDENT SCHOOL DISTRICT

**Property and Casualty Insurance
(Boiler & Machinery, Property & Contents, Inland Marine and Flood)
(Proposal # 17-08-66)**

**Please fill out this form and fax immediately to
Weslaco ISD if you intend to submit a proposal.**

Company Name _____

Address _____

City _____ State _____ Zip _____

Telephone Number _____

Fax Number _____

Contact Name _____

Email Address _____

Please fax this document to (956) 969-6910 to ensure
that you receive any addenda.