



SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT

Agenda Item Summary

Meeting Date: October 16, 2024

Agenda Section: Consent

Agenda Item Title: Approval of RFP 2024-01 Worker’s Compensation Excess Insurance

From: Tony Kingman, CFO

Additional Presenters if Applicable: N/A

Description: The South San Antonio Independent School District (District) has requested proposals from qualified agents to assist with obtaining the best value premiums for workers compensation excess insurance coverage. Agent is to propose quotes to district to determine best value for the employees. The quote is to secure pricing for a maximum of two years.

Historical Data: District has obtained quotes from carriers in previous years through agent.

Recommendation: Recommend to Board of Trustees to approve Barnard Donegan Insurance, BDI as the awarded agent in obtaining best value quotes on half of the district.

Purchasing Director and Approval Date: Victoria Cantu, October 7, 2024

Funding Budget Code and Amount:

Goals: 3. SSAISD will implement program initiatives and activities that reflect a commitment to preparing 100% of students for post-secondary educational or career paths.

2024-01 Worker's Compensation Excess Insurance - Scoring Round

Supplier	Score	Standard Evaluation Scoring Sheet								
		Purchase Price	Reputation of the Vendor's Goods or Services	Quality of the Vendor's Goods or Services	Extent to which the Goods or Services Meets the District's Needs	Vendor's Past Relationship with the District	References	SWMBE Certifications	The total cost to the District to acquire the vendor's goods or services	Value added incentives beneficial to the District.
	100	30.00	10.00	10.00	20.00	5.00	5.00	6.00	5.00	9.00
Barnard Donegan Insurance	91.50	29.50	9.75	9.50	19.50	4.75	4.75	0.00	4.75	9.00
	91.50	29.50	9.75	9.50	19.50	4.75	4.75	0.00	4.75	9.00

Evaluators
Gutierrez, Moses
Rice, Debra
Segovia, YeeYan
Uresti, Rita



RFP 2024-01
 Worker's Compensation Excess Insurance
 Bid Timeline
(can be subjected to change)

Friday, August 2, 2024	1st advertisement on Express Newspaper <i>(Per Texas Education Code, bidding opportunities are to be posted on the local newspaper at a minimal of 2 days, in a two week period)</i>
Friday, August 9, 2024	2nd advertisement on Express Newspaper <i>(Per Texas Education Code, bidding opportunities are to be posted on the local newspaper at a minimal of 2 days, in a two week period)</i>
Monday, August 19, 2024 2:00 pm	Vendor Questions due on Ionwave <i>(Interested vendors have the opportunity to ask questions regarding the bidding opportunities as it pertains to the scope of work, bid details, etc. All questions are to be submitted on Ionwave for public view)</i>
Thursday, August 22, 2024 4:00 pm	Addendum due <i>(Vendor questions are to be answered by this given date. All responses are posted on Ionwave for public view)</i>
Wednesday, August 28, 2024 2:30 pm	Bid Opening 1450 Gillette Blvd San Antonio, TX 78224 <i>(Committee Members are to refer to their invite sent via outlook calendar. The purpose of the Bid opening is to disclose the names of the proposals received. Interested Vendors must submit proposals by this given date)</i>
September 3, 2024	Evaluation Meeting SSAISD Administrative Building, Board Room 101 1450 Gillette Blvd <i>(Committee members will meet to discuss and score proposals received. Depending on the number of submissions received, an additional meeting will be needed. Laptops are needed.</i>
September 18, 2024	Recommendation(s) made to Board of Trustees SSAISD Board Meeting

Barnard Donegan Insurance: A Century of Trust and Innovation

For over 113 years, Barnard Donegan Insurance has epitomized trust and innovation in the insurance industry. Our journey began at the dawn of the 20th century, evolving with the communities we cherish and adeptly navigating the ever-changing tides of the insurance world.

Leadership with Vision

At the helm of our esteemed agency is David Pope, our CEO. With over two decades of insurance experience, David's entrepreneurial journey in Austin, where he built a successful brokerage, paved the way for his pivotal role at BDI. His strategic vision, combined with legal acumen and theological insights, positions him as a unique leader in the sector, guiding BDI with wisdom, integrity, and commercial insight.

Our Dedicated Service Team

Bruce Barnard, Chairman: Bruce Barnard is the driving force behind Barnard Donegan Insurance, serving as the majority owner and leading the agency to success since he began his insurance career in 1973. After graduating from Abilene Christian University with a degree in Business, Bruce has spent over 50 years working as a producer and agency owner in Guadalupe, Bexar, and surrounding counties. In 1993, Bruce purchased Donegan Insurance Agency Inc., transforming it into the trusted entity known as BDI. His unique insight into public entities, drawn from his experience as Mayor of Universal City and a school board member, has been invaluable in providing tailored insurance solutions. Bruce's dedication to excellence and community commitment makes him a trusted advisor and an asset to clients seeking comprehensive insurance solutions.

Scott Barnard, Benefits Manager: Scott Barnard is a seasoned insurance professional with a rich lineage in the industry. His background as an artillery officer has instilled a disciplined and strategic approach to managing benefits. Scott's expertise in employee benefits and his ability to develop specialized approaches to meet clients' unique needs have made him an integral part of the BDI team. His dedication to service and excellence

ensures that our clients receive the highest level of care and customized insurance solutions.

Gwen Crouch, Client Account Manager: Gwen Crouch brings over 40 years of specialization across various sectors to BDI. Her extensive experience ensures our clients receive tailored and expert insurance solutions. Gwen's commitment to client satisfaction and her deep understanding of the insurance landscape make her a trusted and invaluable member of the BDI team.

Commitment to Public Entities

Our profound history and the collective expertise of our team form the foundation of our unparalleled professionalism and dedication. BDI's longstanding tradition of serving Public Entities underscores our unwavering commitment to the communities that have entrusted us with their insurance needs for over a century.

At Barnard Donegan Insurance, we are not just providers of insurance; we are partners in progress, safeguarding the future of the communities we serve.



2024-01 Addendum 1
Barnard Donegan Insurance
Donegan Insurance Agency, Inc. dba
Supplier Response

Event Information

Number: 2024-01 Addendum 1
Title: Worker's Compensation Excess Insurance
Type: Request for Proposal
Issue Date: 8/2/2024
Deadline: 8/30/2024 02:30 PM (CT)
Notes: The South San Antonio Independent School District (SSAISD) requests interested parties to submit proposals for "Worker's Compensation Excess Insurance" This award is contingent upon funding and no guarantee of a minimum amount of work is implied or expressed by this Request for Proposals.

The contract shall be valid for three (3) years from the date of Board of Trustees approval with the option to renew for two (2) additional one (1) year periods based upon the original terms, conditions and pricing if mutually agreeable by both parties.

Should the District opt to exercise any renewal option years, the District reserves the right to re-negotiate pricing for potential cost savings during subsequent renewal periods.

Contact Information

Contact: Victoria Cantu Director of Procurement

Address: Procurement Office

1450 Gillette Blvd.

San Antonio, TX 78224

Phone: (210) 977-7025 x3518

Email: victoria.cantu@southsanisd.net

Barnard Donegan Insurance Information

Contact: Gwen Crouch
Address: PO Box 550
314 N Camp
Seguin, TX 78156
Phone: (830) 303-8300
Email: gcrouch@bdi-insurance.com
Web Address: www.bdi-insurance.com

By submitting your response, you certify that you are authorized to represent and bind your company.

Gwen Crouch

Signature

Submitted at 8/30/2024 10:01:36 AM (CT)

gcrouch@bdi-insurance.com

Email

Supplier Note

Copies of the actual carrier quotes and financial information will be provided after bid - the size and number of these documents exceeded the allowances of the website so only the Pricing Sheets are attached. The actual quotes should be reviewed as they contain full terms and conditions.

Requested Attachments

South San ISD Terms and Conditions

Must upload all pages to include signature on final Page

SSAISD -XSWC Terms and Conditions 8-29-24.pdf

Reference #3

Reference #3 To be completed by reference with uploaded proposal

South San-24-25 Reference Form #3 8-30-24.pdf

Certificate of Insurance

refer to page 6 of the Terms and Conditions for limitations

South San-COI RFP 2024-01 8-29-24.pdf

Edgar Certification Form

Must be completed and uploaded with proposal

South San-EDGAR Cert 8-29-24.pdf

Conflict of Interested Parties_1295

Must be completed and uploaded with proposal

South San-Form 1295-filed 8-26-24 -8-29-24.pdf

SWMBE (HUB) Certifications

Upload Certificates here, if applicable.

South Sa n-24-25 SWMBE Cert 8-30-24.pdf

Conflict of Interest Form

Must be completed and uploaded with proposal

South San-Conflict of Interest Quest 8-29-24.pdf

Reference #1

Reference #1 To be completed by reference with uploaded proposal

South San-24-25 Reference Form #1 8-30-24-1.pdf

Reference #2

Reference #2 To be completed by reference with uploaded proposal

South San-24-25 Reference Form #2 8-30-24.pdf

Reference #4

Reference #4 To be completed by reference with uploaded proposal

South San-XSWC-24-25 Ref #4.pdf

Reference #5

Reference #5 To be completed by reference with uploaded proposal

South San-XSWC-24-25 Ref #5.pdf

HB 89

Required to be uploaded with proposal

South San-HB 89 Form 8-29-24.pdf

SB 252 Verification Form

Required to be uploaded with proposal

South San- SB 252 Verification 8-29-24.pdf

Pricing Sheet

Must upload and completed Pricing template found in the attachments tab.

South San-24-25 XSWC Response Form-for all four carriers 8-29-24.pdf

Statement of Qualifications, Experience, Certification

Summary of Qualifications, Experience, and a copy of certification/license.

BDI-Public Entity Bio for RFPs.pdf

Other Attachments as needed

No response

Bid Attributes

1	<p>Introduction</p> <p>There are attributes, including this one, associated with this proposal. Some are notes and require no response, but most have a required response. **Please select each page on the right-hand side of the blue bar below (at the bottom of this list of attributes) in order to view the next page of Bid Attributes**</p>
2	<p>South San ISD Terms and Conditions</p> <p>South San Antonio ISD Terms and Conditions are provided in an attachment to the proposal. Please check if you agree or disagree to the terms and conditions of this proposal. This is your electronic signature.</p> <p><input type="checkbox"/> Agree</p>
3	<p>Submission Response</p> <p>South San Antonio ISD prefers responses to be submitted online via our electronic system.</p> <p>No fax or email submissions will be accepted.</p> <p>For any questions, please contact South San ISD Procurement Department (210) 977-7025 ext 3518</p> <p>Attention: Victoria Cantu, Director of Procurement South San ISD Administrative Offices 1450 Gillette Blvd San Antonio, TX 78224</p>

4 Communications Statement

Contact between vendors and South San Antonio ISD personnel during the proposal process or evaluation process is strictly prohibited. Any attempt by vendors during the proposal process to contact South San Antonio ISD personnel may result in disqualification. All communication shall go through the Procurement and Contracts Department during this competitive process. All questions received and the corresponding answers will be distributed to all bidders. No verbal responses will be provided. The deadline for questions about this proposal is stated in the Bid Activities and the district will not respond to questions after this time and date. Response to questions will be posted in the form of an addendum to this proposal. The vendors will be responsible for checking the website for any posted addenda.

5 Vendor Required Attachments

Be sure to upload all required documents and forms to the "Response Attachments" tab of this bid event. Missing one or more documents may disqualify interested vendor.

6 Proposal Opening

Proposal Openings are held:

SSAISD Administrative & Central Office
1450 Gillette Blvd
San Antonio, TX 78224

Any proposal received later than the specified time, whether delivered in person or by any other method shall be disqualified. Any questions pertaining to the proposal procedures should be addressed to the Procurement Department at South San Antonio ISD.

If the District office location where bids/proposals are to be submitted is closed due to inclement weather, natural disaster, or for any other cause including if the electronic bid system is unavailable on the due date, the deadline for submission shall be extended until the next District calendar business day, unless the bidder is otherwise notified by the District. The time of day for submission shall remain the same.

7 Section 2

PROPOSAL REQUIREMENTS

****THE FOLLOWING LINES ITEMS BELOW REQUIRE A RESPONSE****

8 Anti-Trust Certification

I affirm under penalty of perjury of the laws of the State of Texas that:

1. I am duly authorized to execute this agreement/contract/proposal on my own behalf or on behalf of the company, corporation, firm, partnership or individual (Company) listed below;
2. In connection with this proposal, neither I nor any representative of the Company have violated any provision of the Texas Free Enterprise and Antitrust Act, Tex. Bus & Comm. Code Chapter 15;
3. In connection with this Proposal, neither I nor any representative of the Company have violated any federal antitrust law; and
4. Neither I nor any representative of the Company have directly or indirectly communicated any of the contents of this proposal to a competitor of the Company or any other company, corporation, firm, partnership or individual engaged in the same line of business as the Company.

I affirm

9 Felony Conviction Notice

Texas Education Code, Section 44.034, Texas Education Code, 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." Is your firm owned or operated by anyone who has been convicted of a felony?

No

10 Felony Conviction Details

If your firm is owned or operated by anyone who has been convicted of a felony, please list their name and the details of the conviction. If not applicable, please enter N/A (not applicable).

n/a

11 Criminal Background Check Requirement

If an employee of a contractor is covered under SB 9, the contractor must bear the burden of obtaining a national, fingerprint-based criminal history check. Under Section 22.0834 of the Education Code, the contractor is then required to certify to the district that the criminal history check has been performed. The contractor, not the district, is responsible for contacting DPS directly to set up an account for the purposes of obtaining criminal history record information. Under the statute SB 9, a contractor is required to conduct a criminal history review on an employee only when the following criteria have been met: *The employer has contracted with district to provide services. *The particular employee will have continuing duties relating to the contract with the district. * The particular employee will have contact with students. A contractor or sub-contractor may not work on District property or any location the District deems a place where students are regularly present when *they have been convicted of a felony or misdemeanor involving moral turpitude, as defined by Texas law or any other offense the District believes might compromise the safety of student, staff or property.

A Proposer's violation of this section shall constitute substantial failure. If the Proposer is the person or owner or operator of the business entity, that individual may not self-certify regarding the criminal history record information and its review, and must submit original evidence acceptable to the district with this Agreement showing compliance. Possession of fire arms, alcohol and/or drugs, even in vehicles, is strictly prohibited on school/district property. The use of tobacco products are not allowed on school district property. ~~~This is your electronic signature.

Agree

1
2 **Bidder's Certification**

Texas Government Code Chapter 2252 relates to bids by nonresident contractors. The pertinent portions of the Act are as follows: Section 2252.001(3) "Nonresident bidder" refers to a person who is not a resident. Section 2252.001(4) "Resident bidder" refers to a person whose principal place of business is in this state, including a contractor whose ultimate parent company or majority owner has its principal place of business in this state. Section 2252.002, as amended by H.B. 3648, 83rd Legislature (2013 Regular Session): "AWARD OF CONTRACT TO NONRESIDENT BIDDER. A governmental entity may not award a governmental contract to a nonresident bidder unless the nonresident underbids the lowest bid submitted by a responsible resident bidder by an amount that is not less than the greater of the following:

(1) the amount by which a resident bidder would be required to underbid the nonresident bidder to obtain a comparable contract in the state in which the nonresident's principal place of business is located; or

(2) the amount by which a resident bidder would be required to underbid the nonresident bidder to obtain a comparable contract in the state in which a majority of the manufacturing relating to the contract will be performed." Section 2252.002, as amended by H.B. 1050, 83rd Legislature (2013 Regular Session): "AWARD OF CONTRACT TO NONRESIDENT BIDDER: A governmental entity may not award a governmental contract to a nonresident bidder unless the nonresident underbids the lowest bid submitted by a responsible resident bidder by an amount that is not less than the amount by which a resident bidder would be required to underbid the nonresident bidder to obtain a comparable contract in:

(1) the state in which the nonresident's principal place of business is located; or

(2) a state in which the nonresident is a resident manufacturer." ~~~ Is the vendor a Resident Bidder of Texas as defined in Texas Government Code Section 2252.001(4)?

Please indicate the status of your company as a "resident" proposer or "nonresident" proposer under these definitions.

1
3 **Non-resident Bidder's Certification**

Non-resident Bidder of Texas as defined in Texas Government Code Section 2252.001(3) ~~~ If your firm is not a Resident Bidder of Texas as defined in Texas Government Code Section 2252.001(4), indicate your firm's principal place of business City and State. If not applicable, please enter N/A (not applicable).

1
4 **SWMBE Certification**

List type of certifications participated by the SWMBE (Small, Women, and Minority Business Enterprises)

Must attach Certificates on the "Responses Attachment" tab

1
5 **Anti-Collusion Statement**

I affirm that I am duly authorized to execute this contract; that this company, corporation, firm, partnership or individual has not prepared this bid in collusion with any other Bidder, and that the contents of this bid as to prices, terms or conditions of said bid 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 bid.

I Agree

**1
6** **Debarment or Suspension Certification**

Non-Federal entities are prohibited from contracting with or making sub-awards under covered transactions to parties that are suspended or debarred or whose principals are suspended or debarred. Covered transactions include procurement of good or services equal to or in excess of \$100,000. Vendors receiving individual awards of \$100,000 or more and all sub-recipients must certify that the organizations and its principals are not suspended or debarred.

(I) Certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department of agency under the Federal OMB, A-102, common rule.

Failure to certify will render bidder non-responsive and will not be considered for award.

**1
7** **No Israel Boycott Certification**

Effective September 1, 2017, a Texas governmental entity may not enter into a contract with a company for goods or services unless the contract contains a written verification from the company that it:

(1) does not boycott Israel; and

(2) will not boycott Israel during the term of the contract. (TEX. GOV'T CODE Ch. 2270)

"Boycott Israel" means refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations specifically with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory, but does not include an action made for ordinary business purposes. TEX. GOV'T CODE §808.001(1)

Vendor certifies that they do not boycott Israel, will not boycott Israel during the term of this Agreement, and are in compliance with Section 2270.002 of the Texas Government Code.

I Agree

**1
8** **No Excluded Nation or Foreign Terrorist Organization Certification**

Effective September 1, 2017, Chapter 2252 of the Texas Government Code provides that a Texas governmental entity may not enter into a contract with a company engaged in active business operations with Sudan, Iran, or a foreign terrorist organization - specifically, any company identified on a list prepared and maintained by the Texas Comptroller under Texas Government Code §§806.051, 807.051, or 2252.153. (A company that the U.S.

Government affirmatively declares to be excluded from its federal sanctions regime relating to Sudan, Iran, or any other federal sanctions regime relating to a foreign terrorist organization is not subject to the contract prohibition.)

Vendor certifies that they do not support foreign terrorist organizations and are in compliance with Sections 2252.152-154 of the Texas Government Code.

Agree

19 Form 1295 - Certificate of Interested Parties

Pursuant HB 1295, the addition of section 2252.908 of the Government Code, all awarded vendors must fill out electronically, with the Texas Ethics Commission's online filing application.
www.ethics.state.tx.us.whatsnew/elf_info_form1295.htm

The law states that a governmental entity or state may not enter into certain contracts with a business entity unless the business entity submits a disclosure of interested parties (Form 1295) to the governmental entity or state agency at the time the business entity submits the signed contract to the governmental or state agency. The Texas Ethics Commission has adopted rules requiring the business to file Form 1295 electronically with the Commission. This form must then be signed and attached in the "Response Attachments" tab of this bid event, prior to any business transaction.

Please note the following:

Box 2: Please enter South San Antonio_ ISD

Box 3: Please use South San Antonio__ ISD's solicitation (bid) number **RFP# South San Antonio** as the identification number being requested and the contract name as description of goods or services.

A **new** form must be completed upon each renewal.

Please acknowledge that you have read and understand that the district may not do business with your company without the submittal of this form.

20 Vendor Employment Certification

For the contract for goods and services, other than goods and services related to telecommunications and information services, building construction and maintenance, or instructional materials, whether the vendor or the vendors ultimate parent company or majority owner;

1) Has its principal place of business in the State of Texas;

OR

2) employs at least 500 persons in Texas.

If you are not a Texas based business, do you have more than 500 employees in Texas?

21 No Deviations or Exceptions

I certify that there are NO deviations or exceptions from the attached specific terms, conditions, and specifications.

22 Deviations and Exceptions

If your company intends to deviate from the Specifications listed in the attached documents, all such deviations and exceptions must be listed here with complete and detailed conditions included. The District will consider any deviations or exceptions in its bid award decisions.

The District reserves the right to accept or reject any proposals based on deviations indicated below. If none, list NONE

23 Purchasing Cooperative

Has your company been awarded a purchasing cooperative contract? If yes, please list the names of the Cooperatives and the contract numbers you have with each. If none, please enter N/A (not applicable).

2
4

Reference Instructions

References must independently fill out Reference Sheets provided in the attachments tab.

Proposers will upload documents with proposal.