

Brownsville Independent School District Employee Benefits / Risk Management

Coverage: Professional Educators and School Board Legal Liability
CSP: 17-123
Term: One year term with an option to renew for two additional one year terms

The Professional Educators and School Board Legal Liability is also known as the Errors & Omissions (E&O) Insurance for the school district, board of trustees and district employees for claims related to breach of contract and alleged wrongful acts.

Seventeen vendors were solicited. One proposal was received.

History

<u>School Year</u>	<u>Premium</u>
2015-2016	\$ 100,089
2016-2017	\$ 114,909
2017-2018	\$ 118,500
2018-2019	\$ 119,320
2019-2020	pending

Option to Renew: July 2019

Current Carrier: Montalvo Insurance Agency / Illinois National Insurance Company
Policy Term: July 18, 2018 to July 17, 2019



Brownsville Independent School District

Agenda Category: General Function
Contracts/MOU Board of Education Meeting: 06/05/18

Item Title: CSP #17-123 Professional Educators X Action
and School Board Legal Liability Information
Insurance Discussion

BACKGROUND:

The Brownsville Independent School District procures the above referenced insurance coverage for the Professional Educators and School Board Legal Liability Insurance. CSP #17-123 was awarded on May 2, 2017 for a one (1) year policy term with the option to renew for an additional two (2) year period. The contract renewal period is July 18, 2018 to July 17, 2019.

FISCAL IMPLICATIONS:

Not to exceed approved budgeted Local Maintenance and Categorical Funds of \$119,320.00. Amount previously expended \$118,500.00.

RECOMMENDATION:

Recommend to enter into the second year of the current contract for the Professional Educators and School Board Legal Liability Insurance to Illinois National Insurance Company/Montalvo Insurance Agency of Weslaco, Texas for an additional one (1) year period based on the approved contract of May 2, 2017. Not to exceed approved budgeted Local Maintenance and Categorical Funds of \$119,320.00

Micaela Escobar
Submitted by: Principal/Program Adm.

Lorenzo Sanchez
Recommended by: AA Supt/Asst. Supt/CFO

Miguel Salinas
Reviewed by: Staff Attorney

Approved for Submission to Board of Education:

E. Zendejas
Dr. Esperanza Zendejas
Superintendent of Schools



BISD PURCHASING DEPARTMENT
PRELIMINARY CONTACT TO VENDORS REGARDING OUR BIDS

COMPANY NAME	CITY	BID	NOTIFIED VENDOR	REC'D BIDS
BILL BEATTY INSURANCE AGENCY, INC	RICHARDSON	17-123	Y	N
BUC FINANCIAL GROUP	SAN ANTONIO	17-123	Y	N
CONNELLY & BARTNESKY	HARLINGEN	17-123	Y	N
DOUG DART	PLANO	17-123	Y	N
GM SOUTHWEST/JESSE TREVINO INSURANCE AGENCY, INC.	MCALLEN	17-123	Y	N
MCGRIFF, SEIBELS & WILLIAMS	HOUSTON	17-123	Y	N
MCKINLEY FINANCIAL SERVICES, INC ATT:RON BEARD	FORT LAUDERDALE	17-123	Y	N
MONARCH MANAGEMENT CORP. dba TEXAS MONARCH MANAGEMENT CORP	TOPEKA	17-123	Y	N
MONTALVO INSURANCE AGENCY	WESLACO	17-123	Y	Y
NEW YORK LIFE INSURANCE CO.	HARLINGEN	17-123	Y	N
ORTIZ INSURANCE & REAL ESTATE	BROWNSVILLE	17-123	Y	N
ROBERT BOOKOUT & ASSOCIATES	RICHMOND	17-123	Y	N
SHEPARD INSURANCE AGENCY	MCALLEN	17-123	Y	N
TEXAS INSURANCE SERVICE CENTER	HARLINGEN	17-123	Y	N
TEXAS MONARCH MANAGEMENT CORPORAT	TYLER	17-123	Y	N
THE BROKERAGE STORE	HARLINGEN	17-123	Y	N
THE BROKERAGE STORE - ALBERT SALINAS	SAN ANTONIO	17-123	Y	N
=====	=====	=====	=====	=====

Count:

17

Micaela Escobar

From: Ramon Montalvo <Ramon@montalvoinsurance.com>
Sent: Thursday, February 28, 2019 9:51 AM
To: Micaela Escobar
Cc: Delia N. Rodriguez; Karina Arguelles; Jessie Villarreal
Subject: Brownsville ISD- School Board Legal

Micaela,

The earliest that most carriers will offer renewal rate/premium information would be 90 days out of expiration . In this case, would be April 18th. We will push for earlier and try to get something back to you by late March. We are waiting to hear back from our AIG underwriter to see what he has to say in your particular circumstance. AS usual, a set of renewal applications and update info would need to be gathered beforehand.



Ramon Montalvo III

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Email: ramon@montalvoinsurance.com



Best Practices

2018 Best Practices Agency



From: Micaela Escobar [mailto:micaela@bisd.us]
Sent: Wednesday, February 27, 2019 8:27 PM
To: Ramon Montalvo <Ramon@montalvoinsurance.com>
Cc: Delia N. Rodriguez <dnrodriguez@bisd.us>; Karina Arguelles <karguelles@bisd.us>
Subject: Brownsville ISD
Importance: High

Ramon,

When is the earliest I can receive the renewal rate? The policy term begins on July 18th, 2019.

Thank you in advance for your anticipated assistance.

Micaela Escobar, MBA, CSR, SHRM-CP

Administrator

Brownsville Independent School District

Employee Benefits / Risk Management

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