



PROPOSAL

RFP #2019-15

Workers Compensation Program

Response Deadline: Wednesday July 31, 2019 at 10:00 a.m., CST



McGRIFF, SEIBELS & WILLIAMS, INC.

8200 IH 10 West, Suite 215

San Antonio, TX 78230

(210) 695-8582 • Fax: (210) 695-8583



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Tab A

Tab A

Title Page



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Tab B



Tab B Table of Contents

Tab A Title Page..... 1

Tab B Table of Contents..... 3

Tab C Letter of Transmittal 4

Tab D Required Proposal Information 5

General..... 5

Loss Prevention 7

Claim Reports..... 10

Financial Management 10

Reinsurance..... 11

Tab E Proposal Response and District Forms..... 12

Attachment A – Certificate of Insurance
 Attachment B – Sample WC Reports





Tab C



Tab C

Letter of Transmittal



McGRIFF, SEIBELS & WILLIAMS, INC.

8200 IH 10 West, Suite 215
San Antonio, TX 78230
(210) 695-8582 • Fax: (210) 695-8583

South San Antonio Independent School District
Attn.: Director of Purchasing
5622 Ray Ellison Blvd.
San Antonio, TX 78242

Subject: Workers Compensation Program
RFP 2019-15

McGriff, Seibels & Williams (McGriff or MSW) is pleased to participate on the South San Antonio Independent School District (SSAISD) Request for Proposal for Workers' Compensation. Our intent throughout this response is to provide a response to each of the attributes in the RFP and to affirm that McGriff has the people, experience, resources, and capabilities to add considerable value in the placement and service of SSAISD's Workers' Compensation program.

Our team has extensive experience working with school districts, led by Ben Odom, CSRM.

We believe that we are uniquely qualified to provide the best overall value to SSAISD, for the following reasons:

- **Texas ISD Expertise:** We service more Texas school districts and public entities than any other brokerage firm.
- **Carrier Relationships:** Unlike several of our peers, we maintain outstanding relationships with all insurance carriers who offer coverage to Texas school districts.
- **Purchasing Power:** No other firm can match our purchasing volume with the insurance carriers in the Texas school district insurance marketplace. We are also an approved vendor with the NCPA Purchasing Cooperative.
- **Local Resources:** We have over 400 insurance professionals located in our Texas offices. Our team is always available to provide immediate response to pressing issues. We also maintain fully-staffed Claims Management, Loss Prevention and Risk Analytics teams in San Antonio. SSAISD will benefit from these local resources.

Our Texas school district experience, large claims team, risk analytics services, and strong underwriting relationships will be of value to SSAISD. We are familiar with the exposures faced by SSAISD and surrounding districts.

Our program offers the same terms the District currently purchases for its Excess Workers' Compensation at a significantly reduced price (**27% rate reduction guaranteed for two years**) along with a robust Risk Management Services offering from McGriff.

We trust that the information contained herein demonstrates that McGriff has the expertise, capabilities and knowledge to effectively serve SSAISD.

Sincerely,

McGRIFF, SEIBELS & WILLIAMS, INC.



LAB 1



Tab D Required Proposal Information

General

1. Provide how long MSW has been in Texas.

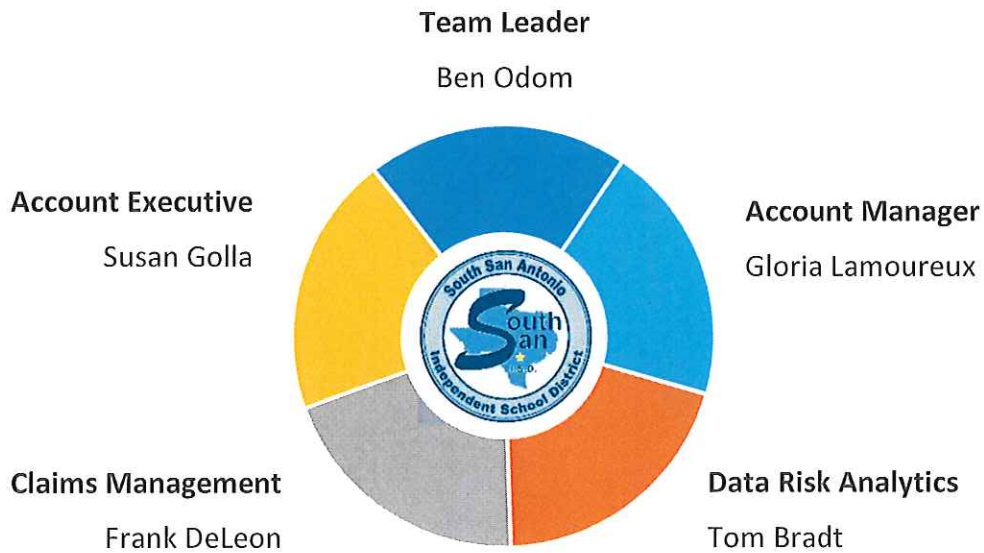
The McGriff Texas offices were established in 1992 and is recognized as the leading school district insurance brokerage operation in Texas.

27 Years

2. Does the Proposal have its own staff, or are services provided by third-party vendors?

McGriff employs a full staff of Insurance & Risk Management professionals that solely serve Texas Public Entities. All services shown in this proposal will be performed by South San Antonio ISD’s proposed McGriff service team.

Team Chart and Bios



McGRIFF, SEIBELS & WILLIAMS, INC.

Main: (210) 695-8582 | Fax: (210) 695-8583 | 1-877-254-6564

Each SSAISD team member assigned has significant experience servicing Texas Public School Districts.

Ben Odom – Team Leader

Ben will be responsible for monitoring team communication and all administrative duties related to the agreed on service plan. He directs and participates in all aspects of program design, marketing, and procurement of insurance and will direct day-to-day servicing. Ben will be responsible for the overall management of your program. He will be available to manage and resolve any issues that may arise. Ben has over 10 years of





experience in Public Entity Risk Management starting his career as a Public Entity underwriter. He has a BBA in Risk Management, BBA in Finance, MBA from St. Mary's University, and License CSR.M.

Susan Golla – Account Executive

Susan has more than 30 years in the insurance industry, joining McGriff in 2001. Her areas of specialty are marketing and servicing of commercial insurance programs for public entities, school districts, and large property schedules. Susan has considerable expertise with public sector clients and related risk management programs. She has long-standing relationships with major underwriters and has been teaching insurance and risk management courses for the past 10 years. In addition to holding a General Lines Agent license she is also a Licensed Risk Manager for Property and Casualty in the State of Texas, and has successfully obtained the CPCU, ARM and CRM professional designations.

Gloria Lamoureux – Account Manager

Gloria will be responsible for daily policy service, processing endorsements, policy issuance, certificates, and updating schedules. Gloria has 30 plus years of experience. She is a General Lines Agent for Property and Casualty in the State of Texas.

Frank DeLeon will serve as Claims Manager

Frank will be responsible for the overall management of your claims program, directing, and coordinating the resolution of difficult claims working in concert with the Account Manager. Frank has over 35 years of experience in Claims Management. His areas of expertise are management of large, complex risk transfer and loss sensitive programs, claims management for all lines of insurance, and Operational Assessments/Behavioral Safety Audits. Frank has a BBA. in Finance from Texas State University. His licenses/certifications are: Multi-lines Insurance Adjuster, and General Agent License (Texas).

Tom Bradt will serve as the Analytics Manager

Tom will be responsible for loss retention analysis; Experience Modifier Rating (EMR) verification; collateral analysis and negotiation; legacy retrospective programs; cost of risk modeling, and loss forecasting. Tom has over 6 years of experience in risk management analysis. Tom's areas of expertise are loss data analysis for customized reports; risk retention analysis and program structure testing; auditing NCCI experience modifiers; evaluation and negotiation of legacy program adjustments; calculating and negotiating collateral requirements; Cost of Risk assessments; and developing customized analytical tools to meet specific needs. His career highlights and accomplishments are reducing Modifier Ratings through worksheet audits; negotiating collateral reductions; successful investigation and negotiation of legacy program adjustments; negotiating more favorable wording on client's deductible specifications; and designing customized tools and exhibits to analyze loss sensitive programs. Tom has a BBA in Finance from the University of Houston. His licenses/certifications include a General Agent License (TX), Associate in Risk Management, and Certified Insurance Counselor.

3. How many public entities does the Proposer serve? Of those public entities, how many Texas public educational entities does the Proposer serve?

McGriff serves over 500 Public Entities across the Country. McGriff serves over 150 Texas School Districts.



Loss Prevention

1. Attach a description of Loss Prevention services provided by your firm.

McGriff is committed to helping you avoid costly claims through state of the art loss control programs, and have a myriad of services available. We can assist with designing, implementing or enhancing a customized safety and loss control program that significantly reduces the frequency and severity of injury. Our professionals will help you assess the effectiveness of your existing programs and procedures, and provide specific recommendations for improvements. We work with your staff to help them recognize problems and develop solutions before a loss occurs. By becoming involved in these programs, our goal is to provide the groundwork necessary for prevention.

Our approach to risk control service focuses on the specific needs of our client's organization. By listening to you and learning about your operations, we can design and implement a customized safety and loss prevention program that will significantly reduce the frequency and severity of injuries. We begin by determining what is currently working well for you, and identify issues your leadership team feels are important for long-term sustainable objectives. We also act as the coordinator of all insurance carrier loss prevention and/or control services and unbundled vendor contracts to assure promised services are delivered.

McGriff strongly believes that safety engineering and claims management should not be viewed as separate functions. Analysis of claims data can provide a roadmap for concentrating loss control efforts that will derive the greatest results.

Our team of loss control professionals average over 21 years of experience in property protection, safety and loss prevention, workers' compensation, and liability in a broad range of industries.

Some specific loss control services are:

- Construction Risk Management Services
- Property Loss/Risk Control
- Coordination with Insurers
- Rapid Response for Loss Situations
- Safety Training
- On-Site Services
- Emergency Response/Disaster Management
- Claims Analysis

Rapid Response for Loss Situations

McGriff's loss control professionals are available on a 24/7 basis, and can respond immediately in the event of a significant loss. We normally arrive before the adjuster, and begin taking pictures and gathering information immediately to assist with prompt claim processing. This quick response assists you and your insurer with defining requirements to bring the loss to a rapid and satisfactory conclusion.

Highlights of McGriff's Loss Control Services:

- Safety programs; training modules & manuals
- Analyses of losses by:
 - Job site
 - Accident
 - Type of injury
 - Exposure
- Monitoring for compliance w/procedures & insurer requirements
- Documenting loss situations to facilitate claims process
- 24/7 availability



Services Available

McGriff is a leader in the public entity marketplace servicing more than 150 clients for city and county governments, educational, transportation districts and non-profit agencies. We are familiar with the exposures faced by SSAISD as well as the usual constraints related to budgets and staffing. Because every public entity has special needs of their own, we search the globe to find just the right fit. Whether it's catastrophe insurance, alternative risk transfer vehicles such as self-insured pools, offshore captives, loss portfolio transfers, OCIP programs or foreign reinsurance placements, the McGriff team has the contacts and resources to get the job done.

Our partners include long-standing, senior level relationships with underwriters that serve county sector, as well as self-insured pools, third party administrators and legal defense firms. Your access to all properly credentialed carriers and vendors will be enhanced by our familiarity with these companies and our knowledge of their performance for other counties.

Why McGriff for Risk Management?

- Property and Liability Insurance advisor for over 150 Texas public entities.
- Strong relationships with all major markets that underwrite counties.
- Access to new and untapped markets for windstorm, flood and other difficult coverages.
- Experts in Alternative Risk Transfer products.
- Focused on county sector issues, including statutory tort immunity and disaster recovery.
- Experts in providing health and welfare consulting services.
- Ability to solve complex claims issues.
- Strength of corporate balance sheet.

Key Risk Management Services

- Marketing & Negotiation
- Loss Control & Safety Consulting
- Contract & Risk Allocation Assistance
- Insurance Committee Participation
- Competitive Bidding Compliance
- Claim Management Assistance
- Administration Assistance





Risk Data Analytics Services

McGriff has developed a quantitative analytics practice to support our clients. Our analytics team provides needed technical support with complex mathematical and statistical modeling to enable our clients to make more informed financial decisions. Some examples of these services include:

Loss Stratification and Analysis

- Determine an optimal range of deductibles that will provide the best premium consideration while shielding the client from absorbing an inordinate amount of risk.

Loss Projection

- Projection of the expected losses for the upcoming year within the deductible/retention for each line. This assists the client in accruing for probable losses and collateral calculations.

Collateral Analysis and Negotiation

- Verify that the current carrier's collateral requirement is reasonable and contest as necessary. Assist with legacy collateral wind down to ensure an expedient return of outstanding collateral.

Program Testing and Optimization / Projected Cost of Risk

- We incorporate the loss stratification results into our marketing efforts to guide the underwriters to the optimum program structure and pricing. The loss picks are incorporated into the various quotes to determine the optimal projected cost of risk for the upcoming policy period.

Customized Reports

- We can create reports to help your leadership team track insurance costs, such as Cost of Risk reports (total cost of risk by policy year) and loss allocation by location / division (dependent upon data availability in the loss runs).





Claim Reports

1. Describe the types of standard reports that are available to Entity for analyzing claims. Attach samples and list any additional charges for these reports.

McGriff is committed to providing South San with several various types of executive reports that will help South San better manage its total cost of risk. We will be able to provide open claim reports, closed claim reports, future expected loss reports along with loss trend analysis reports. The loss trend analysis reports will help identify the historical average loss per claim type, per claim department, frequency of claims per campus, department, etc. These reports will help South San identify loss trends so we can better engage our loss control efforts to mitigate future losses. We have supplied sample claim reports for your review." *Please refer to Attachment B for Sample Reports*

2. Please describe the frequency of these reports

McGriff can provide these reports within a few business days of request from South San.

Financial Management

1. Provide a copy of the Proposer's most recent audited financial statement.

McGriff's parent company, BB&T Corporation, is one of the largest U.S. financial services holding companies, with \$221.9 billion in assets and market capitalization of \$29 billion.

McGriff's parent company, BB&T Corporation, is a publicly traded company (stock ticker BBT). As such, our financial statements are voluminous documents. In the interests of conservation of resources, we would prefer to note the web location where BB&T's financial statements and annual reports are located: <http://bbt.investorroom.com/annual-reports>

Please note that financial statements/reports for preceding years can be found in this area, and future statements/reports will be posted in this area upon completion.

2. Are the program's financial statements prepared in adherence with GAAP, GASB, CGASB 10 and FASB? If not, please explain

Not Applicable. The carrier we are proposing is not a self-insurance pool. They are a standard insurance carrier.

3. How does the Proposer fund and reserve for ultimate claim cost? Is an independent actuary used?

The carrier is a financially strong standard insurance company. They are not a self-insurance pool. The carrier utilizes actuarial analysis to help determine ultimate claim costs.

4. Does the Proposer's program include an assessment feature? If yes, please explain in detail.

The carrier is not a self-insurance pool. Therefore, they cannot and will not assess members for additional premiums due to member equity shortfalls.





Reinsurance

1. Please indicate the name and address of the excess stop loss carrier or reinsurer for the Proposer's program.

The carriers we are proposing are not self-insurance pools. Therefore, they do not have the need to purchase excess coverage or reinsurance over their offering. This allows South San to procure its Workers' Compensation from a far more financially stable provider.

2. List the carrier's financial ratings, if they are not rated, please explain why.

Star Insurance Company. AM Best Rated "A- X"

3. Indicate the terms, limits, and reinsurance of the program's excess stop loss coverage.

The carriers we are proposing are not self-insurance pools. Therefore, they do not have the need to purchase excess coverage or reinsurance over their offering. This allows South San to procure its Workers' Compensation from a far more financially stable provider.



Tab E



Tab E Proposal Response and District Forms

SECTION FOUR
PROPOSAL RESPONSE FORMS

Company Information

Name of company:	McGriff, Seibels & Williams, Inc.
Phone number:	(210) 695-8582
Facsimile number:	(210) 695-8583
Address:	8200 IH 10 West, Ste. 215, San Antonio, TX 78230
Primary business:	Risk Management and Insurance Brokerage Services
Type of company: (corp., partnership, etc.):	Corporation
Year started in business:	Founding Companies = 1886 - Texas = 1992
Number of years administering workers' compensation in Texas:	27 Years
Number of years administering workers' compensation for public educational entities:	30+

Proposers must include in the proposal a notice as to whether the person submitting the bid or an owner or operator of the business entity has been convicted of a felony and the description of the conduct resulting in the conviction. The contract may be terminated if it is determined that the person or business entity failed to give notice or misrepresented the conduct resulting in the conviction.

The Proposer, in compliance with the invitation for proposal on workers' compensation funding, having examined the specifications and being familiar with all conditions in the specifications, hereby proposes to provide the services in accordance with the proposal documents on the attached response sheets.

"The undersigned affirms that they are duly authorized to execute this contract, that this company, corporation, firm, partnership or individual has not prepared this proposal in collusion with any other Proposer, 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."

Having reviewed the specifications, we have complied with all requirements and conditions except as noted on the attachment labeled "Deviations."

 Vice President

Signature and title of authorized representative

McGriff, Seibels & Williams, Inc.	07-30-2019
Proposing Company	Date





Worker's Compensation Pricing

Excess Worker Compensation

	Rates	Contribution/Premium
7380: Bus Drivers	.0962 blended rate	\$60,476
7720: Police	Included	included
8810: Clerical	Included	included
8868: Professional	Included	included
9101: All Others	Included	included
Total Cost:	\$60,476	\$60,476

Self Insured Retention: **\$400,000** (Optional quotes with higher retentions are available)

Alternative Option – **Not Applicable**

Description of Plan:

We have quoted the same program structure with a \$400,000 retention at a significantly reduce premium for the District. Our quote includes the Aggregate Excess with a \$1,000,000 limit and \$1,200,000 loss fund per the current program structure as well. Cash flow protection can be added as well for \$4,652. Our quote comes with a two year rate guarantee which provides comfort and ease for budget purposes. Our program comes with a suite of risk management services and expertise that only McGriff can provide to the District. We are happy to address any questions or concerns the District may have.

Sample policies are available upon request.

Fees: \$5,000

Total Cost: \$65,476 (Excluding cash flow protection)

Ben Odum





FORM A
FIRM INFORMATION

Notice
This form requires an original manual signature after each subsection, a manual signature on the final page and must be included with the proposal in Tab 2 of the Proposal.

STATE OF Texas

§
§
§

**AFFIDAVIT OF OWNERSHIP, CONTROL
AND CORPORATE INFORMATION**

COUNTY OF Bexar County

I, Ben Odom [FULL NAME] HEREAFTER "AFFIANT"

Vice President [STATE TITLE/CAPACITY WITH PROPOSAL] OF

McGriff, Seibels & Williams, Inc. (PROPOSAL'S CORPORATE/LEGAL NAME), WHO

ASSURE THE DISTRICT OF THE FOLLOWING:

1. AFFIANT IS AUTHORIZED TO GIVE THIS AFFIDAVIT AND HAS PERSONAL KNOWLEDGE OF THE FACTS AND MATTERS HEREIN STATED;
2. PROPOSER(S) SEEKS TO DO BUSINESS WITH THE DISTRICT IN CONNECTION WITH RFP #2019-15
Workers Compensation [RFP NUMBER AND TITLE] WHICH IS EXPECTED TO BE IN AN AMOUNT THAT EXCEEDS \$10,000.
3. THE FOLLOWING INFORMATION IS SUBMITTED IN CONNECTION WITH THE PROPOSAL, SUBMISSION OR BID OF PROPOSER IN CONNECTION WITH THE ABOVE DESCRIBED PROJECT OR MATTER.

COMPANY NAME McGriff, Seibels & Williams, Inc.

HOME OFFICE Birmingham LOCAL OFFICE San Antonio

ADDRESS 8200 IH 10 West, Ste. 215

CITY San Antonio

STATE Texas ZIP 78230

TELEPHONE (205) 252-9871 FAX (205) 581-9293 TELEPHONE (210) 695-8582 FAX (210) 695-8583

CONTACT PERSON'S NAME Ben Odom

CONTACT PERSON'S TELEPHONE NUMBER (713) 273-2606 FAX NUMBER (713) 877-8974

Ben Odom





CONTACT PERSON'S E-MAIL ADDRESS bodom@mcgriff.com

1. NUMBER OF YEARS YOUR ORGANIZATION HAS BEEN IN CONTINUOUS OPERATION 100+

2. NUMBER OF YEARS YOUR ORGANIZATION HAS BEEN IN BUSINESS UNDER ITS PRESENT BUSINESS NAME 27+

3. DOES YOUR COMPANY PAY TAXES TO THE SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT? No

4. IF YES, ARE YOUR TAX PAYMENTS TO SSAISD CURRENT? _____

5. DOES ANY OFFICER, PARTNER, OWNER, SALES REPRESENTATIVE AND/OR SPOUSE WORK FOR THE SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT YES NO

6. TYPE OF BUSINESS ENTITY: PUBLICLY TRADED CORPORATION PRIVATE CORPORATION LIMITED PARTNERSHIP PARTNERSHIP SOLE PROPRIETORSHIP NOT FOR PROFIT ENTITY

7. IF CORPORATION, ANSWER THE FOLLOWING QUESTIONS:

DATE OF INCORPORATION 1886

STATE OF INCORPORATION Alabama

CHARTER NUMBER 232-378

PRESIDENT Doug Hodo

VICE PRESIDENT Joseph R. Blasi

CORPORATE SECRETARY Patrick Dessauer

TREASURER Patrick Dessauer

8. IF PARTNERSHIP OR CORPORATION, DATE OF ORGANIZATION CREATION N/A

9. IF SOLE PROPRIETOR, NUMBER OF YEARS IN BUSINESS N/A

10. NUMBER OF YEARS DOING BUSINESS WITH SSAISD None

11. DO YOU HAVE EXPERIENCE WITH OTHER SCHOOL DISTRICTS? YES NO

12. IF YES, PLEASE LIST NAMES OF SCHOOL DISTRICTS MSW currently provides services to over 150 Texas School Districts.

Some of the local Districts that we serve are: Northside ISD, North East ISD, Judson ISD, and Comal ISD.

13. NAME AND COMPLETE ADDRESS OF ALL PARTNERS LISTED ON A SEPARATE SHEET AND ATTACHED.

None

Ben Adom





14. IF OTHER THAN CORPORATION OR PARTNERSHIP, DESCRIBE ORGANIZATION AND NAME OF PRINCIPALS:

15. CHECK ONE OF THE FOLLOWING:

- PROPOSER WILL PROVIDE GOODS AND SERVICES WITH OWN WORK FORCE
- PROPOSER WILL PURCHASE GOODS DIRECTLY FROM THE MANUFACTURER OR OTHER SUPPLIER

16. NAME OF STATE WHERE YOUR HOME OFFICE/HEADQUARTERS IS LOCATED: Birmingham

IF NOT TEXAS, DOES THE STATE HAVE PREFERENTIAL TREATMENT ON BIDS YES NO

IF YES, WHAT PERCENTAGE: _____%

DOES YOUR COMPANY EMPLOY 500 OR MORE PERSONS IN TEXAS? YES NO

I ATTEST THAT I HAVE ANSWERED THE QUESTIONS REGARDING COMPANY INFORMATION TRUTHFULLY AND TO THE BEST OF MY KNOWLEDGE.

Ben Odom

CORPORATE OFFICER'S SIGNATURE

Ben Odom

PRINTED NAME

Vice President

TITLE





FORM B
ANTITRUST CERTIFICATION STATEMENT:

(Texas Government Code §2155.005)

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.

Company Name McGriff, Seibels & Williams, Inc.

Company Address 8200 IH 10 West, Ste. 215

City, State, Zip Code San Antonio, TX 78230

Phone (210) 695-8582

Facsimile (210) 695-8583

Proposer Signature *Ben Odom*

Proposer Printed Name Ben Odom, CSR

Position with Company Vice President

(IF DIFFERENT FROM ABOVE)

Official Authorizing Proposal

Corporate Officer's Signature *Ben Odom*

Printed Name Ben Odom, CSR

Position with Company Vice President





FORM D
SENATE BILL 9 CONTRACTOR CERTIFICATION

Texas Education Code §22.0834(g) Contractor Certification

Introduction: Texas Education Code Chapter 22 requires service contractors to obtain criminal history record information regarding covered employees and to certify to the District that they have done so. Covered employees with disqualifying convictions are prohibited from serving at a school district.

Definitions:

Covered employees: All employees of a contractor who have or will have continuing duties related to the service to be performed at the District and have or will have direct contact with students. The District will be the final arbiter of what constitutes direct contact with students.

Disqualifying conviction: One of the following offenses, if at the time of the offense, the victim was under 18 or enrolled in a public school: (a) a felony offense under Title 5, Texas Penal Code; (b) an offense for which a defendant is required to register as a sex offender under Chapter 62, Texas Code of Criminal Procedure; or (c) an equivalent offense under federal law or the laws of another state.

On behalf of McGriff, Seibels & Williams, Inc. ("Proposer"), I certify that [check one]:

None of Contractor's employees are covered employees, as defined above.

Or

Some or all of Contractor's employee are covered employees. If this box is selected, I further certify that:

(1) In the event Proposer is awarded this contract with the District, Proposer shall obtain all required criminal history record information, through the Texas Department of Public Safety, regarding its covered employees. None of the covered employees that have a disqualifying conviction shall be used to carry out the duties required of this contract. Proposer has taken reasonable steps to ensure that its employees who are not covered employees do not have continuing duties related to the contract services or direct contact with students

(2) If Proposer receives information that a covered employee has a disqualifying conviction, Proposer will immediately remove the covered employee from contract duties and notify the District in writing within 3 business days.

(3) Upon request, Proposer will make available for the District's inspection the criminal history record information of any covered employee. If the District objects to the assignment of a covered employee on the basis of the covered employee's criminal history record information, Proposer agrees to discontinue using that covered employee to provide services at the District.

Noncompliance by Proposer with this certification may be grounds for contract termination.

Proposer Signature Ben Odum

Proposer Printed Name Ben Odum

Position with Company Vice President

Date July 30, 2019





FORM E
PRICING AND SERVICE AFFIRMATION

Proposal of: McGriff, Seibels & Williams, Inc.
(Proposer Firm Name)

To: South San Antonio Independent School District

RFP Number: 2019-11

RFP Name: INDEPENDENT FINANCIAL AUDIT SERVICES CONTRACT

Proposer will provide the product/services to the South San Antonio Independent School District ("SSAISD") and possibly other governmental agencies (through Interlocal-agreements). Additionally, the focus is on identifying all costs associated with the product/services. SSAISD is looking to quantify all fees and work towards solutions that minimize costs, while maintaining or improving current service levels.

Ladies and Gentlemen:

Having carefully examined all the specifications and requirements of this RFP and any attachments thereto, the undersigned proposes to furnish the products/services required pursuant to the above referenced RFP upon the terms quoted below.

1 Price and Products/Services Quotation: The prices quoted shall be SSAISD's pricing for the product or service. There shall be no separate or additional charges, fees, handling or other incidental costs associated in the acquisition of the product/services not disclosed herein. Proposer understands that SSAISD makes no guarantee as to the volume, amount or type of product/services that may be purchased under any Agreement. Proposer certifies and agrees that all prices and any promotion or rebates quoted in the proposal have been reviewed and are the final proposed price and product/service offering for this initial RFP response.

2 SSAISD Payment Terms: SSAISD's standard payment terms for services are "net 30 days" from receipt of the invoice. Indicate below the prompt payment discount that Proposer will provide to SSAISD:

3 General Terms and Conditions: Proposer agrees to the General Terms and Conditions and all other Terms and Conditions of this RFP unless exceptions are identified in the Exception Form (Form C).

Prompt Payment Discount % _____ days / net 30 days.

Respectfully submitted:

Company Name: McGriff, Seibels & Williams, Inc.

By: Ben Odom
Corporate Officer's Signature

Printed Name: Ben Odom

Title: Vice President

Date: July 30, 2019





FORM G
CERTIFICATION OF INSURANCE

Proposer is asked to submit proof of insurance as Form F of Proposal response.

Please refer to Attachment A for McGriff's Certificate of Insurance





FORM H

CERTIFICATE OF INTERESTED PARTIES – FORM 1295

Please note: MSW is a publicly held Corporation. There, as 1295 is not required.

A person or business entity entering into a contract and/or agreement with SSAISD is required by the New Government Code Statute §2252.908, to complete Form 1295 "Certificate of Interested Parties". This form must be submitted online at https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm. Once the online submission has been processed and a claim number has been issued, the form must be printed with the claim number, notarized and then submitted along with the bid/quote/proposal document(s). If Form 1295 is not submitted along with your bid/quote/proposal response, your response may be considered "non-responsive"

CERTIFICATE OF INTERESTED PARTIES		FORM 1295	
Complete Nos. 1 - 4 and 6 if there are interested parties. Complete Nos. 1, 2, 3, 5, and 6 if there are no interested parties.		OFFICE USE ONLY	
1 Name of business entity filing form, and the city, state and country of the business entity's place of business.			
2 Name of governmental entity or state agency that is a party to the contract for which the form is being filed.			
3 Provide the identification number used by the governmental entity or state agency to track or identify the contract, and provide a description of the services, goods, or other property to be provided under the contract.			
4 Name of Interested Party	City, State, Country (place of business)	Nature of Interest (check applicable)	
		Controlling	Intermediary
5 Check only if there is NO Interested Party. <input type="checkbox"/>			
6 AFFIDAVIT I swear, or affirm, under penalty of perjury, that the above disclosure is true and correct.			
_____ Signature of authorized agent of contracting business entity			
AFFIX NOTARY STAMP / SEAL ABOVE			
Sworn to and subscribed before me, by the said _____, this the _____ day of _____, 20____, to certify which, witness my hand and seal of office.			
_____ Signature of officer administering oath	_____ Printed name of officer administering oath	_____ Title of officer administering oath	
ADD ADDITIONAL PAGES AS NECESSARY			





FORM I
SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT CERTIFICATIONS

South San Antonio ISD is in the process of ensuring that all policies and procedures involving the expenditure of federal funds are compliant with the new Education Department General Administrative Guidelines ("EDGAR"). Part of this process involves ensuring that all current vendors agree to comply with EDGAR. You must complete this form and return to South San Antonio ISD along with your proposal.

The following certifications and provisions are required and apply when South San Antonio ISD expends federal funds for any contract resulting from this procurement process. Pursuant to 2 C.F.R. § 200.326, all contracts, including small purchases, awarded by the District and the District's subcontractors shall contain the procurement provisions of Appendix II to Part 200, as applicable.

FELONY CONVICTION NOTIFICATION

Texas Education Code, Section 44.034, Notification of Criminal History of Contractor, 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 for services performed before the termination of the contract."

Does vendor agree? YES Benjamin Initials of Authorized Representative of vendor

CERTIFICATION OF COMPLIANCE WITH TEXAS FAMILY CODE PROVISION

As per Section 14.52 of the Texas Family Code, added by S.B. 84, Acts, 73rd Legislature, R.S. (1993), all bidders must complete and submit with the bid the following affidavit:

I, the undersigned vendor, do hereby acknowledge that NO sole proprietor, partner, majority shareholder of a corporation, or an owner of 10% or more of another business entity is 30 days or more delinquent in paying child support under a court order or a written repayment agreement. I understand that under this provision, a sole proprietorship, partnership, corporation or other entity in which a sole proprietor, partner, majority shareholder or a corporation, or an owner of 10% or more of another entity is 30 days or more delinquent in paying child support under a court order or a written repayment agreement is NOT eligible to bid or receive a state contract.

Does vendor agree? YES Benjamin Initials of Authorized Representative of vendor

CERTIFICATION OF COMPLIANCE WITH HOUSE BILL 89

Vendor certifies that is in compliance with all applicable provisions of the House Bill 89. Purchases made in accordance under the provisions of Subtitle F, Title 10, Government Code Chapter 2270 must comply with the following:

1. Does not boycott Israel currently; and
2. Will not boycott Israel during the term of the contract the above-named Company, business or individual with South San Antonio Independent School District.

Does vendor agree? YES Benjamin Initials of Authorized Representative of vendor





REQUIRED CONTRACT PROVISIONS FOR NON-FEDERAL ENTITY CONTRACTS UNDER FEDERAL AWARDS – APPENDIX II TO 2 CFR PART 200

The following provisions are required and apply when federal funds are expended by South San Antonio ISD for any contract resulting from this procurement process.

- (A) Contracts for more than the simplified acquisition threshold currently set at \$250,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.**

Pursuant to Federal Rule (A) above, when federal funds are expended by South San Antonio ISD, South San Antonio ISD reserves all rights and privileges under the applicable laws and regulations with respect to this procurement in the event of breach of contract by either party.

Does vendor agree? YES Bendina Initials of Authorized Representative of vendor

- (B) Termination for cause and for convenience by the grantee or sub grantee including the manner by which it will be effected and the basis for settlement. (All contracts in excess of \$10,000)**

Pursuant to Federal Rule (B) above, when federal funds are expended by South San Antonio ISD, South San Antonio ISD reserves the right to immediately terminate any agreement in excess of \$10,000 resulting from this procurement process in the event of a breach or default of the agreement by Vendor, in the event vendor fails to: (1) meet schedules, deadlines, and/or delivery dates within the time specified in the procurement solicitation, contract, and/or a purchase order; (2) make any payments owed; or (3) otherwise perform in accordance with the contract and/or the procurement solicitation. South San Antonio ISD also reserves the right to terminate the contract immediately, with written notice to vendor, for convenience, if South San Antonio ISD believes, in its sole discretion that it is in the best interest of South San Antonio ISD to do so. The vendor will be compensated for work performed and accepted and goods accepted by South San Antonio ISD as of the termination date if the contract is terminated for convenience of South San Antonio ISD. Any award under this procurement process is not exclusive and South San Antonio ISD reserves the right to purchase goods and services from other vendors when it is in the best interest of South San Antonio ISD.

Does vendor agree to abide by the above? YES Bendina Initials of Authorized Representative of vendor

- (C) Equal Employment Opportunity. Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."**

Pursuant to Federal Rule (C) above, when federal funds are expended by South San Antonio ISD on any federally assisted construction contract, the equal opportunity clause is incorporated by reference herein.

Does the vendor agree to abide by the above? YES Bendina Initials of Authorized Representative of vendor.





- (D) **Davis-Bacon Act, as amended (40 U.S.C. 3141-3148).** When required by Federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-Federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-Federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or sub recipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency.

Pursuant to Federal Rule (D) above, when federal funds are expended by South San Antonio ISD, during the term of an award for all contracts and sub grants for construction or repair, the vendor will be in compliance with all applicable Davis-Bacon Act provisions.

Does vendor agree? YES ben dnm Initials of Authorized Representative of vendor

- (E) **Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708).** Where applicable, all contracts awarded by the non-Federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

Pursuant to Federal Rule (E) above, when federal funds are expended by South San Antonio ISD, the vendor certifies that during the term of an award for all contracts by South San Antonio ISD resulting from this procurement process, the vendor will be in compliance with all applicable provisions of the Contract Work Hours and Safety Standards Act.

Does vendor agree? YES ben dnm Initials of Authorized Representative of vendor





- (F) **Rights to Inventions Made Under a Contract or Agreement.** If the Federal award meets the definition of “funding agreement” under 37 CFR §401.2 (a) and the recipient or sub recipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or sub recipient must comply with the requirements of 37 CFR Part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency.

Pursuant to Federal Rule (F) above, when federal funds are expended by South San Antonio ISD, the vendor certifies that during the term of an award for all contracts by South San Antonio ISD resulting from this procurement process, the vendor agrees to comply with all applicable requirements as referenced in Federal Rule (F) above.

Does vendor agree? YES Bendm Initials of Authorized Representative of vendor

- (G) **Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended—Contracts and sub grants of amounts in excess of \$150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251- 1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).**

Pursuant to Federal Rule (G) above, when federal funds are expended by South San Antonio ISD, the vendor certifies that during the term of an award for all contracts by South San Antonio ISD resulting from this procurement process, the vendor agrees to comply with all applicable requirements as referenced in Federal Rule (G) above.

Does vendor agree? YES Bendm Initials of Authorized Representative of vendor

- (H) **Debarment and Suspension (Executive Orders 12549 and 12689)—A contract award (see 2 CFR 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.**

Pursuant to Federal Rule (H) above, when federal funds are expended by South San Antonio ISD, the vendor certifies that during the term of an award for all contracts by South San Antonio ISD resulting from this procurement process, the vendor certifies that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency.

Does vendor agree? YES Bendm Initials of Authorized Representative of vendor

- (I) **Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)—Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any**





other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.

Pursuant to Federal Rule (l) above, when federal funds are expended by South San Antonio ISD, the vendor certifies that during the term and after the awarded term of an award for all contracts by South San Antonio ISD resulting from this procurement process, the vendor certifies that it is in compliance with all applicable provisions of the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352). The undersigned further certifies that:

- (1) No Federal appropriated funds have been paid or will be paid for on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of congress, or an employee of a Member of Congress in connection with the awarding of a Federal contract, the making of a Federal grant, the making of a Federal loan, the entering into a cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a Federal contract, grant, loan, or cooperative agreement.
- (2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions.
- (1) The undersigned shall require that the language of this certification be included in the award documents for all covered sub-awards exceeding \$100,000 in Federal funds at all appropriate tiers and that all sub recipients shall certify and disclose accordingly.

Does vendor agree? YES Bendm Initials of Authorized Representative of vendor

**RECORD RETENTION REQUIREMENTS FOR CONTRACTS PAID
FOR WITH FEDERAL FUNDS – 2 CFR § 200.333**

When federal funds are expended by South San Antonio ISD for any contract resulting from this procurement process, the vendor certifies that it will comply with the record retention requirements detailed in 2 CFR § 200.333. The vendor further certifies that vendor will retain all records as required by 2 CFR § 200.333 for a period of three years after grantees or sub grantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

Does vendor agree? YES Bendm Initials of Authorized Representative of vendor

**CERTIFICATION OF COMPLIANCE WITH EPA REGULATIONS
APPLICABLE TO GRANTS, SUBGRANTS, COOPERATIVE
AGREEMENTS, AND CONTRACTS IN EXCESS OF \$100,000 OF
FEDERAL FUNDS**

When federal funds are expended by South San Antonio ISD for any contract resulting from this procurement process in excess of \$100,000, the vendor certifies that the vendor is in compliance with all applicable standards, orders, regulations, and/or requirements issued pursuant to the Clean Air Act of 1970, as amended (42 U.S.C. 1857(h)), Section 508 of the Clean Water Act, as amended (33 U.S.C. 1368), Executive Order 117389 and Environmental Protection Agency Regulation, 40 CFR Part 15.

Does vendor agree? YES Bendm Initials of Authorized Representative of vendor





CERTIFICATION OF COMPLIANCE WITH THE ENERGY POLICY AND CONSERVATION ACT

When federal funds are expended by South San Antonio ISD for any contract resulting from this procurement process, the vendor certifies that the vendor will be in compliance with mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (Pub. L. 94-163, 89 Stat. 871).

Does vendor agree? YES Ben Odom Initials of Authorized Representative of vendor

CERTIFICATION OF COMPLIANCE WITH BUY AMERICA PROVISIONS

Vendor certifies that vendor is in compliance with all applicable provisions of the Buy America Act. Purchases made in accordance with the Buy America Act must still follow the applicable procurement rules calling for free and open competition.

Does vendor agree? YES Ben Odom Initials of Authorized Representative of vendor

CERTIFICATION OF NON-COLLUSION STATEMENT

Vendor certifies under penalty of perjury that its response to this procurement solicitation is in all respects bona fide, fair, and made without collusion or fraud with any person, joint venture, partnership, corporation or other business or legal entity.

Does vendor agree? YES Ben Odom Initials of Authorized Representative of vendor

Vendor agrees to comply with all federal, state, and local laws, rules, regulations and ordinances, as applicable. It is further acknowledged that vendor certifies compliance with all provisions, laws, acts, regulations, etc. as specifically noted above.

Vendor's Name/Company Name: McGriff, Seibels & Williams, Inc.

Address, City, State, and Zip Code: 8200 IH 10 West, Ste. 215, San Antonio, Texas 78230

Phone Number: (210) 695-8582 Fax Number: (210) 695-8583

Printed Name and Title of Authorized Representative: Ben Odom, Vice President

Email Address: bodom@mcgriff.com

Signature of Authorized Representative: Ben Odom

Date: July 30, 2019 Federal Tax ID # 200468966





Attachment A – Certificate of Insurance



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
7/24/2019

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER BB&T Insurance Services, Inc. Risk Management Department 301 College Street, Suite 208 Asheville NC 28801		CONTACT NAME: Nila Swink PHONE (A/C, No, Ext): 828-277-3917 FAX (A/C, No): 888-632-4250 E-MAIL ADDRESS: CertificateRequests@bbandt.com	
INSURED BB&T Corporation and Subsidiaries c/o BB&T Insurance Services Inc. 301 College Street, Suite 208 Asheville NC 28801		INSURER(S) AFFORDING COVERAGE NAIC #	
01BBTMAIN		INSURER A: Hartford Fire Insurance Company	19682
		INSURER B: Travelers Property Casualty Co of Amer	25674
		INSURER C: XL Insurance America, Inc.	24554
		INSURER D: Twin City Fire Insurance Company	29459
		INSURER E: Fireman's Fund Insurance Company	21873
		INSURER F: Continental Insurance Company	35289

COVERAGES **CERTIFICATE NUMBER: 677491019** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:		22CSES44603	5/1/2019	5/1/2020	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COM/POP AGG \$ 2,000,000
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY		22CSES44604 22CSES44605	5/1/2019 5/1/2019	5/1/2020 5/1/2020	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
B C	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$		ZUP10P9038319NF US00010498LI19A	5/1/2019 5/1/2019	5/1/2020 5/1/2020	EACH OCCURRENCE \$ 25,000,000 AGGREGATE \$ 25,000,000 Excess - 1st Layer \$ 25MM excess 25MM
A D	<input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N N/A	22WNS44600 22WBRS44601	5/1/2019 5/1/2019	5/1/2020 5/1/2020	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
E F	2nd Layer Excess Umbrella 3rd Layer Excess Umbrella		SHX00032387136 6024338871	5/1/2019 5/1/2019	5/1/2020 5/1/2020	50,000.00 25,000,000 Excess of 50MM Excess of 100MM

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 22WNS44600 - Primary Workers Compensation (Various Writing Company Names within the Hartford Fire Insurance Group apply based on the state of employment) ; 22WBRS44601 - Workers Compensation for Wisconsin ONLY
 McGriff, Seibels & Williams Inc. is a subsidiary of BB&T

CERTIFICATE HOLDER South San Antonio Independent School District 5622 Ray Ellison Blvd. San Antonio TX 78242	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE <i>Nila S. Swink</i>
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ACORD 25 (2016/03)

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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
07/22/2019

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER MCGRIFF, SEIBELS & WILLIAMS, INC. 3400 Overton Park Drive SE Suite 300 Atlanta, GA 30339	CONTACT NAME: PHONE (A/C, No, Ext): 404 497-7500 FAX (A/C, No):	
	E-MAIL ADDRESS:	
INSURED BB&T Corp & Subs c/o BB&T Ins Svcs 300 College Street, Suite 208 Asheville, NC 28801	INSURER(S) AFFORDING COVERAGE	
	INSURER A : XL Specialty Insurance Company	NAIC # 37885
	INSURER B : U.S. Specialty Insurance Company	NAIC # 29599
	INSURER C :	
	INSURER D :	
	INSURER E :	

COVERAGES **CERTIFICATE NUMBER:** DJQT2MUH **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR VVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMPI/OP AGG \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory In NH) <input type="checkbox"/> Y/N If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	BANKERS' PROF LIABILITY			ELU157686-18	10/01/2018	10/01/2019	Limit of Liability \$ 15,000,000
B	EXCESS BANKERS' PROF LIABILITY			14-MGU-18-A44857			\$10,000,000 Excess of \$ 15,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 Excess Bankers Professional Liability- Effective 10/01/18- 10/01/19
 *ACE American Insurance Co. (Quota Share Lead) (NAIC#: 22667) - (Policy #: DOX G25568084 010) - Limit- \$15,000,000 part of \$20,000,000 in excess of \$25,000,000
 *Arch Insurance Co. (Quota Share) (NAIC#: 11150) - (Policy #: BLX9300032-02) - Limit- \$5,000,000 part of \$20,000,000 in excess of \$25,000,000
 *National Union Fire Insurance Company of Pittsburgh, Pa. (NAIC#: 19445) - (Policy #: 01-933-19-03) - Limit- \$15,000,000 in excess of \$45,000,000
 *Continental Casualty Co. (NAIC#: 20443) - (Policy #: 596729338) - Limit- \$10,000,000 in excess of \$60,000,000
 *Endurance Risk Solutions (Quota Share Lead) (NAIC#: 43630) - (Policy #: FIX10005599204) - Limit-\$12,500,000 part of \$30,000,000 in excess of \$70,000,000
 *Freedom Specialty Insurance Co. (NAIC#: 22209) - (Policy #: XMF1802469) - Limit-\$7,500,000 part of \$30,000,000 in excess of \$70,000,000
 *Markel American Insurance Co. (NAIC#: 28932) - (Policy #: MKLM6EL0003916) - Limit-\$10,000,000 part of \$30,000,000 in excess of \$70,000,000
 (continued next page)

CERTIFICATE HOLDER South San Antonio Independent School District 5622 Ray Ellison Blvd. San Antonio, TX 78242	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE





AGENCY CUSTOMER ID: _____

LOC #: _____



ADDITIONAL REMARKS SCHEDULE

Page 2 of 2

PRODUCER MCGRIFF, SEIBELS & WILLIAMS, INC.		INSURED BB&T Corp & Subs c/o BB&T Ins Svcs	
POLICY NUMBER			
CARRIER	NAIC CODE	ISSUE DATE: 07/22/2019	

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
 FORM NUMBER: _____ FORM TITLE: _____

(continued from previous page)

Bankers' Professional Deductible is \$25,000,000
 Insurance Agents' E&O Deductible is \$15,000,000

Bankers' Professional Liability includes Insurance Agents' E&O.

McGriff Seibels & Williams, Inc. and McGriff Insurance Services, Inc. are wholly owned subsidiaries of BB&T Insurance Holdings, Inc.

Crump Life Insurance Services are wholly owned subsidiaries of BB&T Insurance Holdings, Inc.

CRC Insurance Services, Inc. and its wholly owned subsidiaries are wholly owned subsidiaries of BB&T Insurance Holdings, Inc. - Hanleigh Management, Inc., Cooper Gay Re and J.H Blades & Co. Inc. are wholly owned subsidiaries of CRC Insurance Services, Inc.

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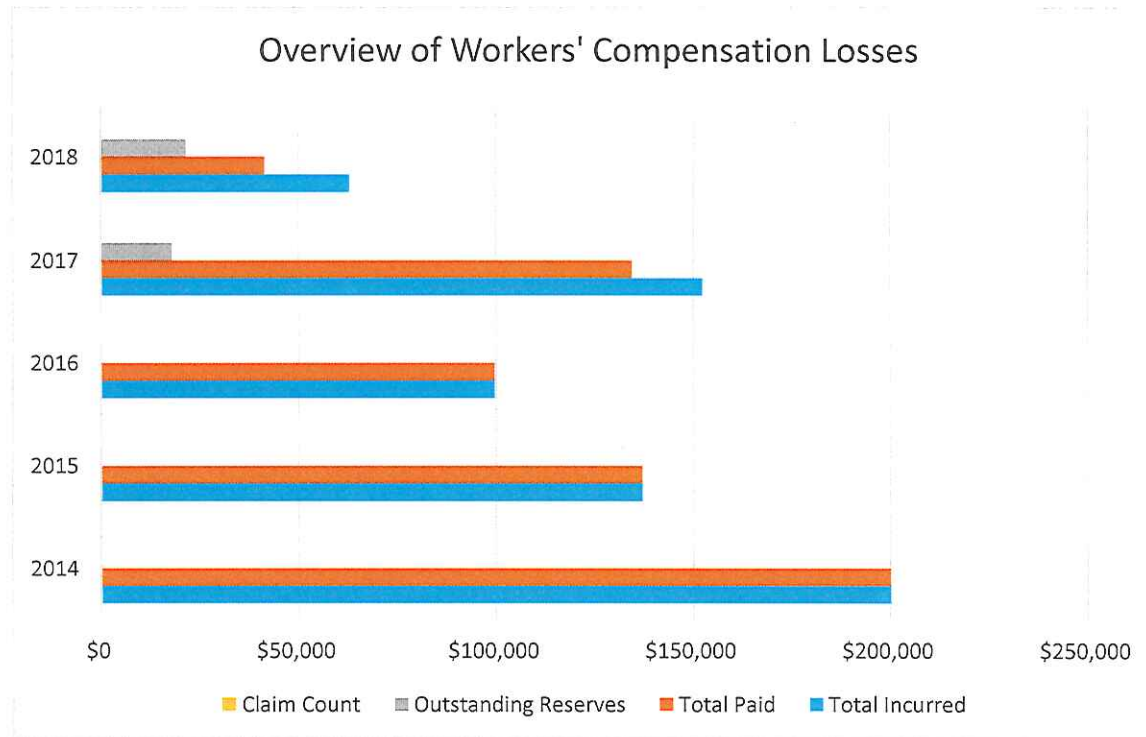


Attachment B – Sample WC Reports

South San Antonio ISD: Overview of Workers' Compensation Losses

Data: Losses as of 5/31/2019

EFFECTIVE DATE	TOTAL INCURRED	TOTAL PAID	OUTSTANDING RESERVES	CLAIM COUNT
9/1/2014	\$200,176	\$200,176	\$0	95
9/1/2015	\$137,176	\$137,176	\$0	110
8/31/2016	\$99,679	\$99,679	\$0	95
8/31/2017	\$152,448	\$134,627	\$17,821	90
8/31/2018	\$62,993	\$41,462	\$21,531	57
Grand Total	\$652,472	\$613,120	\$39,352	447





South San Antonio ISD: Overview of Medical Only, Lost Time and Report Only WC Claims

Data: Losses as of 5/31/2019

Average Cost*			
EFFECTIVE DATE	MEDICAL ONLY	LOST TIME	OVERALL AVERAGE
9/1/2014	\$636	\$10,164	\$2,224
9/1/2015	\$591	\$3,598	\$1,247
8/31/2016	\$435	\$4,325	\$1,049
8/31/2017	\$547	\$6,371	\$1,752
8/31/2018	\$602	\$4,261	\$1,125
OVERALL AVERAGE	\$559	\$5,656	\$1,490

*Note: Average Cost Excludes Report Only

Total Incurred Cost			
EFFECTIVE DATE	MEDICAL ONLY	LOST TIME	GRAND TOTAL
9/1/2014	\$47,711	\$152,465	\$200,176
9/1/2015	\$50,824	\$86,351	\$137,176
8/31/2016	\$34,806	\$64,873	\$99,679
8/31/2017	\$37,771	\$114,676	\$152,448
8/31/2018	\$28,909	\$34,084	\$62,993
Grand Total	\$200,022	\$452,450	\$652,472

Total Claim Count			
EFFECTIVE DATE	MEDICAL ONLY	LOST TIME	GRAND TOTAL
9/1/2014	75	15	90
9/1/2015	86	24	110
8/31/2016	80	15	95
8/31/2017	69	18	87
8/31/2018	48	8	56
Grand Total	358	80	438





South San Antonio: Overview of WC Claims by Claim Type and Nature of Injury - Total Incured Cost

Data: Losses as of 5/31/2019

CLAIM TYPE	NATURE OF INJURY	9/1/2014	9/1/2015	8/31/2016	8/31/2017	8/31/2018	GRAND TOTAL
MEDICAL ONLY	Burn or Scald			\$849		\$929	\$1,779
	Carpal Tunnel Syndrome			\$167			\$167
	Concussion		\$667		\$410		\$1,077
	Contagious Disease	\$406					\$406
	Contusion	\$10,310	\$19,069	\$6,560	\$10,252	\$6,213	\$52,404
	Crushing	\$341				\$700	\$1,041
	Cut, Puncture, Scrape, Laceration	\$3,494	\$1,451	\$1,752	\$1,901	\$1,351	\$9,949
	Electric Shock			\$300		\$312	\$612
	Foreign Body			\$183	\$349	\$212	\$744
	Fracture		\$668	\$1,155		\$700	\$2,523
	Inflammation	\$434	\$344			\$28	\$806
	Multiple Physical Injuries Only	\$1,991	\$3,514	\$10,002	\$4,638	\$981	\$21,125
	N/A	\$0	\$200				\$200
	No Physical Injury			\$1,029	\$370	\$1,240	\$2,639
	Occupational Disease or Cumulative Injury				\$452		\$452
	Other	\$3,742	\$14,723	\$1,064	\$276	\$302	\$20,107
	Poisoning				\$479		\$479
	Sprain	\$9,366	\$3,202	\$9,783	\$9,707	\$5,816	\$37,875
Strain	\$17,448	\$6,987	\$1,962	\$8,938	\$10,125	\$45,461	
Vision Loss	\$178					\$178	
MEDICAL ONLY TOTAL		\$47,711	\$50,824	\$34,806	\$37,771	\$28,909	\$200,022
LOST TIME	Concussion				\$2,827		\$2,827
	Contusion	\$45,062	\$16,519	\$10,237	\$5,263	\$882	\$77,964
	Cut, Puncture, Scrape, Laceration		\$357	\$865			\$1,222
	Dislocation				\$4,139		\$4,139
	Fracture		\$20,980		\$15,646		\$36,626
	Multiple Physical Injuries Only	\$34,201	\$0	\$16,146	\$12,824		\$63,171
	Other		\$13,458	\$0			\$13,458
	Rupture				\$11,997		\$11,997
	Sprain	\$29,266	\$2,999	\$28,654	\$22,266	\$29,892	\$113,076
Strain	\$43,936	\$32,038	\$8,972	\$39,713	\$3,311	\$127,969	
LOST TIME TOTAL		\$152,465	\$86,351	\$64,873	\$114,676	\$34,084	\$452,450
GRAND TOTAL		\$200,176	\$137,176	\$99,679	\$152,448	\$62,993	\$652,472





South San Antonio ISD: Overview of WC Claims by Claim Type and Nature of Injury - Total Claim Count

Data: Losses as of 5/31/2019

CLAIM TYPE	NATURE OF INJURY	9/1/2014	9/1/2015	8/31/2016	8/31/2017	8/31/2018	GRAND TOTAL
MEDICAL ONLY	Burn or Scald			2		2	4
	Carpal Tunnel Syndrome			1			1
	Concussion		1		1		2
	Contagious Disease	1					1
	Contusion	19	35	21	21	10	106
	Crushing	1				1	2
	Cut, Puncture, Scrape, Laceration	9	6	6	6	3	30
	Electric Shock			1		1	2
	Foreign Body			1	1	1	3
	Fracture		1	1		1	3
	Inflammation	1	1			1	3
	Multiple Physical Injuries Only	6	6	15	10	2	39
	N/A	1	1				2
	No Physical Injury			7	3	5	15
	Occupational Disease or Cumulative Injury				1		1
	Other	4	23	7	1	1	36
	Poisoning				1		1
	Sprain	6	2	11	11	10	40
Strain	26	10	7	13	10	66	
Vision Loss	1					1	
MEDICAL ONLY TOTAL		75	86	80	69	48	358
LOST TIME	Concussion				1		1
	Contusion	3	8	3	1	1	16
	Cut, Puncture, Scrape, Laceration		1	1			2
	Dislocation				1		1
	Fracture		1		2		3
	Multiple Physical Injuries Only	3	1	3	3		10
	Other		5	1			6
	Rupture				1		1
	Sprain	2	2	3	4	4	15
	Strain	7	6	4	5	3	25
LOST TIME TOTAL		15	24	15	18	8	80
GRAND TOTAL		90	110	95	87	56	438

*Note: Count Excludes Report Only





South San Antonio ISD: Overview of WC Claims by Cause of Injury

Data: Losses as of 5/31/2019

Average Cost*						
CAUSE OF INJURY	9/1/2014	9/1/2015	8/31/2016	8/31/2017	8/31/2018	OVERALL AVERAGE
Burn or Scald		\$3,757	\$383		\$465	\$973
Caught In, Under, or Between	\$171	\$394	\$603	\$634	\$288	\$443
Cut, Puncture, Scrape	\$272	\$261	\$287	\$2,088	\$676	\$910
Fall, Slip, or Trip	\$3,208	\$1,402	\$1,220	\$2,220	\$1,625	\$1,996
Miscellaneous Causes	\$569	\$960	\$271	\$385	\$286	\$556
Motor Vehicle	\$3,999	\$0	\$146	\$230	\$45	\$539
N/A	\$406	\$200				\$303
Strain or Injury	\$1,743	\$2,625	\$1,901	\$1,908	\$2,099	\$2,059
Striking Against	\$177	\$459		\$5,605	\$332	\$1,877
Struck or Injured By	\$984	\$424	\$304	\$933	\$586	\$647
Grand Total	\$2,224	\$1,247	\$1,049	\$1,752	\$1,125	\$1,490

*Note: Average Cost Excludes Report Only

Total Incurred Cost						
CAUSE OF INJURY	9/1/2014	9/1/2015	8/31/2016	8/31/2017	8/31/2018	GRAND TOTAL
Burn or Scald		\$3,757	\$1,149		\$929	\$5,836
Caught In, Under, or Between	\$341	\$1,181	\$4,218	\$634	\$1,151	\$7,524
Cut, Puncture, Scrape	\$1,632	\$1,565	\$574	\$16,705	\$1,351	\$21,828
Fall, Slip, or Trip	\$153,969	\$64,512	\$48,787	\$71,055	\$30,867	\$369,191
Miscellaneous Causes	\$2,845	\$11,516	\$1,899	\$2,312	\$2,003	\$20,575
Motor Vehicle	\$7,997	\$0	\$1,314	\$1,377	\$90	\$10,779
N/A	\$406	\$200				\$606
Strain or Injury	\$24,408	\$44,619	\$39,914	\$28,619	\$20,993	\$158,553
Striking Against	\$707	\$919		\$16,816	\$332	\$18,773
Struck or Injured By	\$7,869	\$8,907	\$1,824	\$14,931	\$5,276	\$38,807
Grand Total	\$200,176	\$137,176	\$99,679	\$152,448	\$62,993	\$652,472





South San Antonio ISD: Overview of WC Claims by Cause of Injury (Continued)

Data: Losses as of 5/31/2019

Total Claim Count						
CAUSE OF INJURY	9/1/2014	9/1/2015	8/31/2016	8/31/2017	8/31/2018	GRAND TOTAL
Burn or Scald		1	3		2	6
Caught In, Under, or Between	2	3	7	1	4	17
Cut, Puncture, Scrape	6	6	2	8	2	24
Fall, Slip, or Trip	50	46	40	33	19	188
Miscellaneous Causes	5	12	7	6	7	37
Motor Vehicle	2	1	9	7	3	22
N/A	2	1				3
Strain or Injury	14	17	21	16	10	78
Striking Against	4	2		3	1	10
Struck or Injured By	10	21	6	16	9	62
Grand Total	95	110	95	90	57	447

South San Antonio ISD: Overview of WC Claims by Claim Type and Cause of Injury - Average Cost Per Claim*

Data: Losses as of 5/31/2019

CLAIM TYPE	CAUSE OF INJURY	9/1/2014	9/1/2015	8/31/2016	8/31/2017	8/31/2018	OVERALL AVERAGE
MEDICAL ONLY	Burn or Scald			\$383		\$465	\$416
	Caught In, Under, or Between	\$171	\$394	\$603	\$634	\$288	\$443
	Cut, Puncture, Scrape	\$272	\$242	\$287	\$398	\$676	\$343
	Fall, Slip, or Trip	\$509	\$744	\$569	\$813	\$716	\$654
	Miscellaneous Causes	\$569	\$1,030	\$271	\$385	\$286	\$553
	Motor Vehicle	\$3,999	\$0	\$146	\$163	\$45	\$558
	N/A	\$406	\$200				\$303
	Strain or Injury	\$1,337	\$356	\$402	\$364	\$1,158	\$673
	Striking Against	\$177	\$459		\$679	\$332	\$330
	Struck or Injured By	\$155	\$424	\$304	\$393	\$498	\$378
MEDICAL ONLY AVERAGE		\$636	\$591	\$435	\$547	\$602	\$559
LOST TIME	Burn or Scald		\$3,757				\$3,757
	Cut, Puncture, Scrape		\$357		\$13,921		\$7,139
	Fall, Slip, or Trip	\$13,464	\$3,074	\$3,823	\$9,820	\$6,470	\$7,018
	Miscellaneous Causes		\$610				\$610
	Motor Vehicle				\$363		\$363
	Strain or Injury	\$2,759	\$5,865	\$4,898	\$4,995	\$4,295	\$4,778
	Striking Against				\$8,068		\$8,068
	Struck or Injured By	\$6,786			\$3,272	\$894	\$3,065
LOST TIME AVERAGE		\$10,164	\$3,598	\$4,325	\$6,371	\$4,261	\$5,656
OVERALL AVERAGE		\$2,224	\$1,247	\$1,049	\$1,752	\$1,125	\$1,490

*Note: Average Cost Excludes Report Only





South San Antonio ISD: Overview of WC Claims by Claim Type and Cause of Injury - Total Incurred Cost

Data: Losses as of 5/31/2019

CLAIM TYPE	CAUSE OF INJURY	9/1/2014	9/1/2015	8/31/2016	8/31/2017	8/31/2018	GRAND TOTAL
MEDICAL ONLY	Burn or Scald			\$1,149		\$929	\$2,079
	Caught In, Under, or Between	\$341	\$1,181	\$4,218	\$634	\$1,151	\$7,524
	Cut, Puncture, Scrape	\$1,632	\$1,208	\$574	\$2,784	\$1,351	\$7,550
	Fall, Slip, or Trip	\$19,325	\$24,551	\$18,200	\$21,955	\$11,457	\$95,488
	Miscellaneous Causes	\$2,845	\$10,296	\$1,899	\$2,312	\$2,003	\$19,355
	Motor Vehicle	\$7,997	\$0	\$1,314	\$652	\$90	\$10,053
	N/A	\$406	\$200				\$606
	Strain or Injury	\$13,373	\$3,563	\$5,627	\$3,642	\$8,107	\$34,312
	Striking Against	\$707	\$919		\$679	\$332	\$2,637
Struck or Injured By	\$1,084	\$8,907	\$1,824	\$5,115	\$3,488	\$20,417	
MEDICAL ONLY TOTAL		\$47,711	\$50,824	\$34,806	\$37,771	\$28,909	\$200,022
LOST TIME	Burn or Scald		\$3,757				\$3,757
	Cut, Puncture, Scrape		\$357		\$13,921		\$14,278
	Fall, Slip, or Trip	\$134,645	\$39,961	\$30,586	\$49,100	\$19,410	\$273,703
	Miscellaneous Causes		\$1,220				\$1,220
	Motor Vehicle				\$726		\$726
	Strain or Injury	\$11,035	\$41,056	\$34,287	\$24,977	\$12,886	\$124,241
	Striking Against				\$16,137		\$16,137
	Struck or Injured By	\$6,786			\$9,816	\$1,788	\$18,389
LOST TIME TOTAL		\$152,465	\$86,351	\$64,873	\$114,676	\$34,084	\$452,450
GRAND TOTAL		\$200,176	\$137,176	\$99,679	\$152,448	\$62,993	\$652,472





South San Antonio ISD: Overview of WC Claims by Claim Type and Cause of Injury - Total Claim Count

Data: Losses as of 5/31/2019

CLAIM TYPE	CAUSE OF INJURY	9/1/2014	9/1/2015	8/31/2016	8/31/2017	8/31/2018	GRAND TOTAL
MEDICAL ONLY	Burn or Scald			3		2	5
	Caught In, Under, or Between	2	3	7	1	4	17
	Cut, Puncture, Scrape	6	5	2	7	2	22
	Fall, Slip, or Trip	38	33	32	27	16	146
	Miscellaneous Causes	5	10	7	6	7	35
	Motor Vehicle	2	1	9	4	2	18
	N/A	1	1				2
	Strain or Injury	10	10	14	10	7	51
	Striking Against	4	2		1	1	8
	Struck or Injured By	7	21	6	13	7	54
MEDICAL ONLY TOTAL		94	75	87	80	71	407
LOST TIME	Burn or Scald		1				1
	Cut, Puncture, Scrape		1		1		2
	Fall, Slip, or Trip	10	13	8	5	3	39
	Miscellaneous Causes		2				2
	Motor Vehicle				2		2
	Strain or Injury	4	7	7	5	3	26
	Striking Against				2		2
	Struck or Injured By	1			3	2	6
LOST TIME TOTAL		15	24	15	18	8	80
GRAND TOTAL		90	110	95	87	56	438

*Note: Count Excludes Report Only





South San Antonio ISD: Overview of WC Claims by Body Part

Data: Losses as of 5/31/2019

Average Cost*						
BODY PART	9/1/2014	9/1/2015	8/31/2016	8/31/2017	8/31/2018	OVERALL AVERAGE
Head	\$296	\$856	\$245	\$977	\$324	\$567
Lower Extremities	\$2,537	\$2,011	\$1,359	\$2,371	\$1,931	\$1,940
Multiple Body Parts	\$2,515	\$706	\$1,171	\$2,106	\$578	\$1,613
Neck				\$392		\$392
Trunk	\$1,006	\$554	\$1,155	\$1,066	\$1,550	\$1,041
Upper Extremities	\$2,359	\$1,383	\$595	\$1,411	\$731	\$1,337
Grand Total	\$2,224	\$1,247	\$1,049	\$1,752	\$1,125	\$1,490

*Note: Average Cost Excludes Report Only

Total Incurred Cost						
BODY PART	9/1/2014	9/1/2015	8/31/2016	8/31/2017	8/31/2018	GRAND TOTAL
Head	\$889	\$6,848	\$1,959	\$4,885	\$1,297	\$15,879
Lower Extremities	\$40,597	\$60,338	\$50,282	\$54,531	\$28,959	\$234,708
Multiple Body Parts	\$98,076	\$20,469	\$23,417	\$48,433	\$6,356	\$196,751
Neck				\$392		\$392
Trunk	\$11,071	\$6,648	\$12,708	\$15,987	\$13,946	\$60,361
Upper Extremities	\$49,543	\$42,872	\$11,313	\$28,219	\$12,435	\$144,382
Grand Total	\$200,176	\$137,176	\$99,679	\$152,448	\$62,993	\$652,472

Total Claim Count						
BODY PART	9/1/2014	9/1/2015	8/31/2016	8/31/2017	8/31/2018	GRAND TOTAL
Head	4	8	8	5	4	29
Lower Extremities	19	30	37	23	15	124
Multiple Body Parts	39	29	20	24	12	124
Neck				1		1
Trunk	11	12	11	17	9	60
Upper Extremities	22	31	19	20	17	109
Grand Total	95	110	95	90	57	447





South San Antonio ISD - WC Retention Overview

Note: Losses valued as of 5/31/2019

Claim Cost		Retention: Loss Limited to...				Transfer: Loss Excess of...			
Effective Date	Total Incurred	\$10,000	\$25,000	\$50,000	\$100,000	\$10,000	\$25,000	\$50,000	\$100,000
9/1/2014	\$200,176	\$138,215	\$196,768	\$200,176	\$200,176	\$61,961	\$3,408	\$0	\$0
9/1/2015	\$137,176	\$116,483	\$137,176	\$137,176	\$137,176	\$20,692	\$0	\$0	\$0
8/31/2016	\$99,679	\$89,416	\$99,679	\$99,679	\$99,679	\$10,263	\$0	\$0	\$0
8/31/2017	\$152,448	\$129,030	\$151,248	\$152,448	\$152,448	\$23,418	\$1,200	\$0	\$0
8/31/2018	\$62,993	\$54,593	\$62,993	\$62,993	\$62,993	\$8,400	\$0	\$0	\$0
Grand Total	\$652,472	\$527,738	\$647,864	\$652,472	\$652,472	\$124,734	\$4,608	\$0	\$0

Historical Averages by Deductible Level	\$10,000	\$25,000	\$50,000	\$100,000
	\$105,548	\$129,573	\$130,494	\$130,494

Historical Retention by Deductible Level	\$10,000	\$25,000	\$50,000	\$100,000
	81%	99%	100%	100%

Claim Count		Count: Claims at or below...				Count: Claims in Excess of...			
Effective Date	Total Count	\$10,000	\$25,000	\$50,000	\$100,000	\$10,000	\$25,000	\$50,000	\$100,000
9/1/2014	95	88	93	95	95	7	2	0	0
9/1/2015	110	108	110	110	110	2	0	0	0
8/31/2016	95	93	95	95	95	2	0	0	0
8/31/2017	90	86	89	90	90	4	1	0	0
8/31/2018	57	55	57	57	57	2	0	0	0
Grand Total	447	430	444	447	447	17	3	0	0

