



Property and Liability Underwriting Survey Fiscal Year 2024-2025

Welcome to the Property & Liability Underwriting Fiscal Year 2024-2025 Survey. Your time and effort are once again appreciated in completing the annual P&L Underwriting Exposure Survey. Completing this survey helps the JPA and our insurance brokers properly evaluate coverage. Please complete this on-line survey no later than **January 31, 2024**.

Please enter your responses in this UW Survey Form and your information will automatically be sent to us via e-mail and note that the form cannot save your data so it **must** be completed in one sitting.

Please also complete Exhibits 1, 2, 3, 4 & 5, if applicable. District spreadsheets are acceptable for all exposures except Property. The Property Valuation worksheet sent to you in September 2023 is in the format required by our broker. No other formats will be accepted. Please update this worksheet and send it back to us with the other exhibits if you have not already done so.

Your participation in providing required data will assist our broker in developing our FY 2024-2025 insurance package. If you need any clarification, please contact Kathleen Sampson at 858-295-6952, as she maintains all of the P&L Underwriting information.

Thank you for your prompt responses!

Sarah Espiritu on behalf of Julie Nester
Senior Manager, Property and Liability Program
San Diego County Office of Education

^ required

I. SCHOOL OPERATIONS

1. Name of District/Charter School *

2. Does the school conduct/sponsor high risk classes in the following?

For each class check marked, fill out one Exhibit 1 form.

<https://www.sdcoe.net/fs/resource-manager/view/c24b35e3-53a0-468d-9de4-baffac1d97bb> *

	Yes	No
Archery	<input type="radio"/>	<input type="radio"/>

3. Does the school conduct/sponsor high risk classes in the following?

For each class check marked, fill out one Exhibit 1 form.

<https://www.sdcoe.net/fs/resource-manager/view/c24b35e3-53a0-468d-9de4-baffac1d97bb> *

Cycling

Yes

Snorkeling

Soccer

Surf/Rafting

Other (Please describe below)

Wrestling

USA Travel

Water/Snow Skiing

Rugby

Polo

Media Broadcasting

4. Lacrosse please explain:

Mountain Climbing

Scuba Diving

Power Tools

5. How many students participate in athletics? *

6. Are coaches trained annually on the signs and symptoms of concussions?

*

Yes

No

7. Is there someone who is trained in First Aid always present during practices or games? *

Yes

No

8. Please advise the number of kilns and locations. *

9. How many swimming pools do you have? Please include the number of diving boards. *

10. Are pools open to the public?

11. Do you have daycare available on site? *

Yes

No

12. If yes, please provide the number of children cared for:

13. Do you staff any lawyers?

Yes

No

14. How many lawyers do you staff?

15. Do you staff any psychologists or psychiatrists?

Yes

No

16. If yes, how many?

17. Are auto repair classes conducted? *

Yes

No

18. If yes, please indicate ownership of vehicles on which the work is performed:

Students

School Staff

Public

19. Describe auto repair work performed:

20. Is there any type of Hold Harmless agreement signed by the parent/student with regard to Auto Repair?

(If yes, please provide a copy of the agreement.)

Yes

No

21. Are vehicles road tested?

Yes

No

22. Are any repair vehicles being driven or moved by students? Only licensed students authorized.

Yes

No

23. Does your school use drones?

Any use of watercraft or aircraft is excluded from JPA coverage. Unmanned Aerial Systems (Drones) are covered provided they are used for official business and/or curriculum based activities and are in compliance with FAA Regulations. *

Yes

No

24. If your school owns drones, how many?

25. Please provide make and model of each drone:

26. Do you have a regular program for inspecting premises and equipment?

*

Yes

No

27. If yes, please provide the name and title of the responsible party:

28. Please describe the program and frequency of inspections: *

29. Are ALL sites inspected annually for hazardous materials? *

Yes

No

30. If yes, do you have SDS (Safety Data Sheets)?

Yes

No

31. Is an inventory survey prepared annually for hazardous materials?

Yes

No

32. Have recommendations from the hazardous materials survey been completed?

Yes

No

33. Please describe waste and method of disposal:

34. Is a Facilities Use agreement with Hold Harmless clause signed when school facilities are used by outside groups? *

Yes

No

35. Are certificates of insurance and additional insured endorsements provided from each group using school facilities? *

Yes

No

36. Does your school have a workplace violence policy? *

Yes

No

37. Have your employees been trained in workplace violence? *

Yes

No

38. Does your school have a Sexual Harassment/Awareness Training Program in place? (NOTE: Employees must receive training every two years.) Training is provided at no additional charge. *

Yes

No

39. Are there any armed paid security guards hired or contracted? *

Yes

No

40. Are they school employees?

Yes

No

41. If yes, how many armed security guards do you have? Please provide details:

42. Do you have an Injury and Illness Prevention Program?

Please provide a copy of your Injury and Illness Prevention Program (IIPP).

Please see <https://www.sdcoe.net/fs/resource-manager/view/2d4828a1-4734-4c71-8d0c-82ad6eb35326> for an example. If you are not in compliance with Title 8, you will be subject to Cal-OSHA citations/fines. *

Yes

No

43. Do you have any specific loss control needs?

JPA loss control is available to review your program.

Please contact your district's assigned Loss Control Representative.

Please visit <https://www.sdcoe.net/administrative-services/business-services/risk-management/joint-powers-authority#fs-panel-84833>. *

Yes

No

II. CRIME (Loss of Money and Securities)

44. Are funds kept in safe(s) overnight or when school is closed? *

Yes

No

45. If no, please describe security of funds:

46. Average daily exposure at any one location for cash: *

47. Average daily exposure at any one location for checks: *

48. Average daily exposure at any one location of cash and checks held overnight: *

49. Maximum daily exposure at any one location of cash: *

50. Maximum daily exposure at any one location of checks: *

51. Maximum daily exposure for checks and cash at one location overnight: *

52. How often do you bank? *

53. Do you have armored car or courier pickup? *

Yes

No

54. If yes, by whom?

55. How often?

56. Are checks stamped "For Deposit Only"? *

Yes

No

57. Are countersignatures required? *

Yes

No

58. If yes, for what amount?

59. Are bank accounts reconciled by someone not authorized to deposit or withdraw? *

Yes

No

60. If yes, how often are accounts reconciled?

61. Are employees mandated to take an annual vacation? *

Yes

No

62. If yes, must employees take at least one, 5 consecutive day period?

Yes

No

III. TRANSPORTATION

63. Describe transportation maintenance facilities: *

Yes-On-site garage

Yes-Local garage

None

64. What is the number of mechanics? *

65. What is the number of fleet managers? *

66. What is the number of fleet maintenance managers? *

67. Are monthly safety meetings conducted? *

68. Is student transportation provided for by outside contractors?

The JPA requires that you attach Insurance Certificates and Additional Endorsements for ALL outside transportation contractors.

Please provide a sample contract copy. *

Yes

No

69. Do you hire buses? *

Yes

No

70. How many buses do you hire?

71. What is the cost of hire annually?

72. Do you hire autos or vans? *

Yes

No

73. How many autos and vans do you hire annually?

74. What is the cost of hire annually?

75. Do you require Motor Vehicle Record checks (MVR's) on volunteers routinely driving on school business? *

Yes

No

76. Do you provide transportation for other than school activities? *

Yes

No

77. If yes, please describe and include the frequency, number of vehicles, number of miles, and gross receipts:

78. Do you provide transportation service repair for other entities? *

Yes

No

79. If yes, which entities?

Schools

Employees

Public

80. If public, please describe the work performed and organizations involved:

81. Do you rent vehicles under short-term (less than six months) leases? *

Yes

No

82. If yes, please indicate the type of vehicles (van, buses, passenger vehicles, etcl), the frequency, and the number of rental days per year:

IV. ADDITIONAL INSURANCE INFORMATION

1. ELECTRONIC DATA COMPUTER and SOFTWARE PROCESSING EQUIPMENT (EDP) – Coverage will be renewed by the JPA unless otherwise instructed. Please provide accurate, updated replacement value with supporting documentation on EXHIBIT 4: <https://www.sdcoe.net/fs/resource-manager/view/37c47993-92ce-4297-8fb6-24ae85378a50>.

Please note member Cyber Liability Coverage is included under the JPA Property and Liability Program, unless JPA is notified separate coverage is purchased.

83. Your survey response will be sent to us via email and we would appreciate it no later than January 31, 2024. Thank you for your time.

Please provide your first name, last name, title, and e-mail address below:

*

This content is neither created nor endorsed by Microsoft. The data you submit will be sent to the form owner.

 Microsoft Forms