



## Risk Management JPA Fringe Benefits Consortium



SAN DIEGO COUNTY AND IMPERIAL COUNTY SCHOOLS

# Property & Liability Underwriting Survey Fiscal Year 2026-2027

Welcome to the Property & Liability Underwriting Fiscal Year 2026-2027 Survey. Your time and effort are truly 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 online survey no later than **January 31, 2026**.

Please also complete and email [Exhibit 1](#), [Exhibit 2](#), [Exhibit 3](#), [Exhibit 4](#) and [Exhibit 5](#), along with any other required items. If you have any questions, please contact Kathleen Sampson at 858-295-6952 or [Kathleen.Sampson@sdcoe.net](mailto:Kathleen.Sampson@sdcoe.net).

Thank you for your prompt responses!

**Sara Espiritu on behalf of Julie Nester**

Senior Manager, Property and Liability Program

San Diego County Office of Education

\*Required

## School Operations

1. Name of District/Charter School\*

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

- |                                           |                                             |                                            |
|-------------------------------------------|---------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Aircraft Repair  | <input type="checkbox"/> Flying/Gliding     | <input type="checkbox"/> Rugby             |
| <input type="checkbox"/> Archery          | <input type="checkbox"/> Football           | <input type="checkbox"/> Scuba Diving      |
| <input type="checkbox"/> Auto Racing      | <input type="checkbox"/> Foreign Travel     | <input type="checkbox"/> Snorkeling        |
| <input type="checkbox"/> Cheer Leading    | <input type="checkbox"/> Lacrosse           | <input type="checkbox"/> Soccer            |
| <input type="checkbox"/> Cycling          | <input type="checkbox"/> Media Broadcasting | <input type="checkbox"/> Surf/Rafting      |
| <input type="checkbox"/> Equestrian       | <input type="checkbox"/> Mountain Climbing  | <input type="checkbox"/> USA Travel        |
| <input type="checkbox"/> Field/Ice Hockey | <input type="checkbox"/> Polo               | <input type="checkbox"/> Wrestling         |
| <input type="checkbox"/> Firearms         | <input type="checkbox"/> Power Tools        | <input type="checkbox"/> Water/Snow Skiing |
| <input type="checkbox"/> Fireworks        | <input type="checkbox"/> Rodeos             | <input type="checkbox"/> Other             |

3. How many students participate in athletics? \*

4. Are coaches trained annually on the signs and symptoms of concussions? \*

- ☐ Yes
- ☐ No

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

- ☐ Yes
- ☐ No

6. Please advise the number of kilns and locations: \*

7. Do you have swimming pools? \*

- ☐ Yes
- ☐ No

8. Do you have daycare available on site? \*

- ☐ Yes
- ☐ No

9. Do you staff any lawyers? \*

- ☐ Yes
- ☐ No

10. Do you staff any psychologists or psychiatrists? \*

- ☐ Yes
- ☐ No

11. Are auto repair classes conducted? \*

- ☐ Yes
- ☐ No

12. 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

13. Do you have a regular program for inspecting premises and equipment? \*

- ☐ Yes
- ☐ No

14. Are ALL sites inspected annually for hazardous materials? \*

- ☐ Yes
- ☐ No

15. Is an inventory survey prepared annually for hazardous materials? \*

- ☐ Yes
- ☐ No

16. Have recommendations from the hazardous materials survey been completed? \*

- ☐ Yes
- ☐ No

17. Please describe waste and method of disposal: \*

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

- ☐ Yes
- ☐ No

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

- ☐ Yes
- ☐ No

20. Does your organization have a workplace violence prevention program? \*

- ☐ Yes
- ☐ No

21. Have your employees been trained in workplace violence? \*

- ☐ Yes
- ☐ No

22. Does your organization have a Sexual Harassment/Awareness Training Program? \*

- ☐ Yes
- ☐ No

Employees must receive training every two years. Training is provided at no additional charge.

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

- ☐ Yes
- ☐ No

24. If you answered 'Yes' above, how many? \*

25. Do you have an Injury and Illness Prevention Program? \*

Injury and Illness Prevention Plan Sample: <https://www.sdcoe.net/fs/resource-manager/view/2d4828a1-4734-4c71-8d0c-82ad6eb35326>. If you are not in compliance with Title 8, you will be subject to Cal-OSHA citations/fines.

- ☐ Yes
- ☐ No

26. 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 see Loss Control Services: <https://www.sdcoe.net/administrative-services/business-services/risk-management/joint-powers-authority#fs-panel-84833>

- ☐ Yes
- ☐ No

## Crime (Loss of Money and Securities)

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

- ☐ Yes
- ☐ No

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

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

30. Average daily exposure at any one location of cash and checks overnight: \*

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

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

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

34. How often do you bank? \*

35. Do you have armored car or courier pickup? \*

☐ Yes

☐ No

36. Are checks stamped 'For Deposit Only'? \*

☐ Yes

☐ No

37. Are countersignatures required? \*

☐ Yes

☐ No

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

☐ Yes

☐ No

39. Are employees mandated to take an annual vacation? \*

☐ Yes

☐ No

## Transportation

40. Describe transportation maintenance facilities: \*

☐ Yes, on-site garage

☐ Yes, local garage

☐ None

41. What is the number of mechanics? \*

42. What is the number of fleet managers? \*

43. What is the number of fleet maintenance managers? \*

44. Are monthly safety meetings conducted? \*

- ☐ Yes
- ☐ No

45. Is any student transportation provided by outside contractors? If yes, please provide copies. \*

- ☐ Yes
- ☐ No

46. Do you contract for student transportation using buses? If yes, please provide copies. \*

- ☐ Yes
- ☐ No

47. Do you contract for student transportation using vans or other vehicle types? \*

- ☐ Yes
- ☐ No

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

- ☐ Yes
- ☐ No

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

- ☐ Yes
- ☐ No

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

## Survey Attachments

Please complete and email the Exhibits and other underwriting survey attachments to Kathleen Sampson [kathleen.sampson@sdcoe.net](mailto:kathleen.sampson@sdcoe.net). Additional items to include are your Injury and Illness Prevention Plan, Insurance Certificates and Additional Insured Endorsements for ALL outside Transportation Contractors.

51. Files Sent\*

- ☐ Yes
- ☐ No

## Submit Survey

52. Name\*

53. Title\*

54. Email Address\*