Santa Maria Independent School District
11119 Military Rd Santa Maria TX 78592
(956) 565-6308 (956) 565-0598 Fax

BID ITEM: Student /Athletic Accident Insurance

BID DESCRIPTION: **S1-2026-2027** Insurance for Students in Athletics and other UIL Activities, and School Sponsored Events

BID DEADLINE: **Thursday, July 09, 2026**
10:00 a.m. (CST)

The Santa Maria Independent School District (SMISD) is accepting Request for Proposals for: Student Athletic Insurance Proposals are to be mailed or hand delivered to the attention of the Business Office, Santa Maria Independent School District, and 11119 Military Rd Santa Maria Texas 78592.

Please mark your envelope plainly: "Student Athletic Insurance: RFP #S1-2026-2027 ". Any proposals received late will be returned unopened. Santa Maria ISD is not responsible for proposals misplaced or mailed incorrectly.. Please reply using the enclosed documents. Please submit one (1) original and three (3) copies of your proposal. Please submit in the format provided, in order to expedite our analysis. We will only consider proposals submitted in our format. Any questions on this Request for Proposals should be submitted in writing to Salvador Acosta, Director of Operations and Special Programs, via email, sacosta@smisd.net. The District will not be entertaining questions via phone. The Santa Maria ISD reserves the right to accept, reject any and /or all proposals, waive minor technicalities, or to award the contract to the most responsible offeror which best serves the interest of the District. We look forward to hearing from you.

Requests for Proposals will be received at the office of **Mr. Salvador Acosta, Dir. of Operations & Special Programs, 11119, Santa Maria TX 78592**.

Standard Terms & Conditions

THE WORDS "BIDS, PROPOSALS, QUOTES" AND THEIR DERIVATIVES MAY BE USED INTERCHANGEABLY IN THESE TERMS AND CONDITIONS. THESE TERMS AND CONDITIONS ARE APPLICABLE ON ALL BIDS, PROPOSALS, QUOTES, PURCHASE ORDERS AND THEIR DERIVATIVES.

1. BIDS, IN DUPLICATE, ARE TO BE DELIVERED TO SANTA MARIS ISD BUSINESS OFFICE DEPARTMENT, F.O.B. DESTINATION IN AN OPAQUE, SEALED ENVELOPE, WITH THE BID NUMBER AND THE DUE DATE DISPLAYED ON THE OUTSIDE. SANTA MARIA ISD shall not be held liable for any proposal that is improperly identified and thus not considered for award.

2. NO BID: Bidders may opt to send a NO BID response back to Santa Maria ISD.

3. LATE BIDS: Late bids will not be accepted or considered. Late Bids will be returned to vendors unopened. Santa Maria ISD will not be responsible for bids delivered incorrectly or misplaced bids The date/time stamp in the Purchasing Office shall be the official time of receipt.

4. UNSIGNED BIDS will NOT be considered. ONLY SIGNED bids will be accepted. Faxed bids or electronic submissions will NOT be accepted.

5. BIDDER SHALL PROVIDE with their bid response, all documentation required including all required forms, Failure to provide this information may result in rejection of bid.

6. BID PRICES are to remain firm for one (1) year from date of award, unless otherwise specified.

7. BID MUST COMPLY with all federal, state, county, and local laws concerning these types of goods/services. ALL ITEMS MUST MEET OSHA STANDARDS OF COMPLIANCE AND BE ASBESTOS FREE.

8. Samples, if applicable or when requested, shall be furnished at no cost to Santa Maria ISD within five (5) days of the request. If not destroyed during the evaluation, samples will be returned to the bidder upon request at the bidder's expense. Samples, for which no return request is received by SANTA MARIA ISD within seven (7) days of bid award, will be considered a donation to the district and will be distributed accordingly.

9. DESIGN, STRENGTH, QUALITY of materials must be new and conform to the highest Standards of manufacturing practice. All bid items shall be new, in first class condition, including containers suitable for shipment and storage, unless otherwise indicated in the bid. Santa Maria ISD will not accept "factory seconds" or otherwise

inferior goods and reserves the right to return such item(s) within thirty day (30) days of receipt at vendor's expense.

10. REMEDIES: BIDDERS OR THEIR AUTHORIZED REPRESENTATIVES are expected to fully inform themselves as to the conditions, requirements and specifications before submitting bids Failure to do so will be at the bidder's own risk and bidder cannot secure relief on the plea of error. Neither law nor regulation makes allowance for errors of omission or commission on the part of bidders.

11. ALTERING BIDS: Bids cannot be altered or amended after submission deadline. Any interlineation, alteration, or erasure made before opening time must be initialed by the signer of the bid, guaranteeing authenticity.

12. RESPONSIBLE BIDDER. The business must be a well-established organization and have an adequate number of trained personnel to ensure quality and performance and completion of contract within a specified time period.

13. REFERENCES: Santa Maria ISD may request bidders to supply, with this bid, a list of at least five (5) references where like goods/services have been supplied by their firm to entities of similar size and scope. Include name of firm, address, telephone number and name of representative.

14. WITHDRAWAL OF BID: A bid may not be withdrawn or canceled by the bidder without the permission of Santa Maria ISD for a period of ninety (90) days following the date designated for the receipt of bids, and bidder so agrees upon submittal of their bid. TO EXPEDITE EVALUATION of the bids, BIDS must be submitted on Santa Maria ISD forms; although additional information may be attached for evaluation purposes.

15. SALES TAX: Santa Maria ISD is exempt by law from payment of Texas and Local Sales Tax and Federal Excise Tax.

16. NO CASH ADVANCE discount will be considered.

17. BID EVALUATION. The lowest bid will not necessarily be the successful bid. Bids will be evaluated not only in terms of the cost of the goods/equipment, but also in terms of responsiveness of that proposed to the District's needs and requirements. The District will award the bid on the basis of best value.

18. EVALUATION CRITERIA. In determining to whom to award a contract, the District shall consider: (1) the purchase price; (2) the reputation of the vendor and of the vendor's goods or services; (3) the quality of the vendor's goods or services; (4) the extent to which the goods o services meet the District's needs; (5) the vendor's past relationship with the district; (6) the impact on the ability of the district to comply with laws and rules relating to historically underutilized businesses; (7) the long-term cost to

the district to acquire the vendor's goods or services; and (8) for a contract for goods and services, other than goods and services related to telecommunications and information services, building construction and maintenance, or instructional materials, whether the vendor or the vendors ultimate parent company or majority owner;

(A) Has its principal place of business in this state; or

(B) Employs at least 500 persons in this state; and

(9) any other relevant factor specifically listed in the request for bids or proposals.

19. BID AWARD: Santa Maria ISD reserves the right to award bids as a whole or on a line item basis, whichever is in the best interest of the District.

20. PLEASE BID on each item separately. Provide unit prices on quantity specified and extended amount. In cases of errors in extensions, unit price shall govern.

21. IF DURING THE LIFE OF THE CONTRACT, the successful bidder's net prices to other customers for items awarded herein are reduced below the contracted price, it is understood and agreed that the benefits of such reduction shall be extended to Santa Maria ISD.

22. DELIVERY: All products delivered as a result of this contract must have the delivery and/or freight charges (FOB) Santa Maria ISD Designated Location with inside delivery included in the bid price.

23. CONFLICT OF INTEREST: No public official shall have interest in this contract except in accordance with Vernon's Texas Codes Annotated, Local Government Code Title 5. Subtitle C, Chapter 171.

24. ETHICS: The bidder shall not offer or accept gifts or anything of value to enter into any business arrangement with any employee, official or agent of Santa Maria ISD.

25. DEVIATIONS FROM SPECIFICATIONS. All deviations from the specifications must be noted in writing, in detail by the bidder at the time of submittal of the bid. The absence of a written list of specification deviations will hold the bidder strictly accountable to the District's specifications as written. Any deviations from the specifications written not previously submitted, as required, will be grounds for rejection of the materials/goods and/or equipment when delivered.

26. EXCEPTIONS/SUBSTITUTIONS: All bids meeting the intent of this invitation to bid will be considered for award. Bidders taking exception to the specifications, or offering substitutions, shall state these exceptions in the section provided or by attachment as part of the bid. The absence of such a list shall indicate that the bidder has not taken exceptions and Santa Maria ISD shall hold the bidder responsible to perform in strict accordance with specifications of the invitation. Santa Maria ISD will not accept

substitutes after item(s) have been awarded as specified. Santa Maria ISD reserves the right to accept any and all or none of the exception(s)/substitution(s) bid which are deemed to be in the best interest of Santa Maria ISD.

27. DESCRIPTIONS: Any reference to model and/or make/manufacturer used in bid specifications is descriptive, not restrictive. It is used to indicate the type and quality desired. Bids on items of like quality will be considered.

28. "OR EQUAL" PRODUCTS will be evaluated after bids are received, based on literature submitted and any required testing of the product. It is the vendor's responsibility to submit sufficient data for the District to properly analyze an "or equal" item.

29. ADDENDA: Any interpretations, corrections, or changes to this bid and specifications will be made by addenda. Sole issuing authority of addenda shall be vested in Santa Maria ISD Business Office Agent. Addenda will be posted on the purchasing website.

30. ADDENDA MUST BE ACKNOWLEDGED WITH BID SUBMITTAL. An addenda acknowledgment form will be provided with bids requiring acknowledgment of addenda.

31. CHANGE ORDERS: No oral statement of any person shall modify otherwise change, or affect the terms, conditions, pricing or specifications stated in the resulting contract. All change orders to the contract will be made in writing by Santa Maria ISD Business Office Agent.

32. SUCCESSFUL BIDDER SHALL defend, indemnify and save harmless Santa Maria ISD and all its officers, agents and employees from all suits, actions, or other claims of any character, name and description brought to or on account of any injuries or damages received or sustained by any person, persons or property on account of any negligent act or fault of the successful bidder, or of any agent, employee, subcontractor or supplier in the execution of, or performance under, any contract which may result from bid award. Successful bidder indemnifies and will indemnify and save harmless Santa Maria ISD from liability, claim or demand on their part, agents, servants, customers, and/or employees, whether such liability, claim or demand arise from event or casualty happening within the occupied premises themselves or happening upon or in any of the halls, elevators, entrances, stairways or approaches to the facilities within the occupied premises. Successful bidder shall pay any judgment with costs which may be obtained against Santa Maria ISD growing out of such injury or damages.

33. CONTRACT: This bid, when properly accepted by Santa Maria ISD, shall constitute an integral part of any contract, equally binding between the successful bidder and Santa Maria ISD. No different or additional terms will become a part of this contract with the exception of Change Orders.

34. TERMINATION OF CONTRACT: This contract shall remain in effect until contract expires, delivery and acceptance of products and /or performance of services is concluded subject to the following conditions:

A. Santa Maria ISD reserves the right to review the performance of vendor at all times.

B. Santa Maria ISD will have the right to cancel any contract entered into under the terms and conditions of this bid for any reason at any time on thirty (30) days written notice. Vendor shall have the right to cancel the contract subject to Santa Maria ISD approval at any time on thirty (30) days written notice and justification. The successful bidder must state therein the reasons for such cancellation. In the event of any actual contract cancellation, Santa Maria ISD will not be held responsible for loss of business or any termination expenses incurred by the vendor.

35.Santa Maria ISD reserves the right to terminate contract at the expiration of each budget period. The contract is for current revenues only. Local Government Code Section 271.903.

36. TERMINATION FOR DEFAULT: Santa Maria ISD reserves the right to enforce the performance of this contract in any manner prescribed by law or deemed to be in the best interest of Santa Maria ISD in the event of breach or default of this contact.Santa Maria ISD reserves the right to terminate the contract immediately in the event the successful bidder fails to:

A. Meet schedules;

B. Default in the payment of any fees;

C. Otherwise perform in accordance with these specifications.

37. REPRESENTATION: The vendor represents that the items and/or services provided by the vendor hereunder shall conform to those represented and described in the attachments. Notwithstanding anything to the contrary herein, if for any reason Santa Maria ISD determines in its sole discretion, that part or all of such items and/or services fails to meet the expectation of Santa Maria ISD, SMISD may on ten (10) day notice terminate this Agreement and receive the pro-rata portion of the contract sum paid to the vendor by Santa Maria ISD for the unexpired term of the Agreement.

38. BREACH OF CONTRACT or default authorizes Santa Maria ISD to exercise any or all of the following rights: Santa Maria ISD may take possession of the assigned premises and any fees accrued or becoming due to date; Santa Maria ISD may take possession of all goods, fixtures and materials of successful bidder therein and may foreclose its lien against such personal property, applying the proceeds toward fees due or thereafter becoming due. Santa Maria ISD reserves the right to award canceled contract to next lowest and best bidder as it deems to be in the best interest of Santa Maria ISD In such event, the District may charge the successful bidder the difference for any additional cost of such bid item.

39. IN THE EVENT the successful bidder shall fail to perform, keep or observe any of the terms and conditions, Santa Maria ISD shall give the successful bidder written notice of such default; and in the event said default is not remedied to the satisfaction and approval of Santa Maria ISD within two (2) working days of receipt of such notice by the successful bidder, default will be declared and all the successful bidder's rights shall terminate.

40. BIDDER, IN SUBMITTING THIS BID, agrees that Santa Maria ISD shall not be liable to prosecution for damages in the event that Santa Maria ISD declares the bidder in default.

41. GRACE PERIOD: Santa Maria ISD requests the right to continue in force this contract for a period not to exceed ninety (90) days after expiration date for unforeseeable reasons on a month to month basis if agreed to by both parties.

42. PATENTS/COPYRIGHTS: The successful bidder agrees to protect Santa Maria ISD from claim involving infringements of patents and/or copyrights.

43. CONTRACT ADMINISTRATOR: Under this contract, Santa Maria ISD may appoint a contract administrator with designated responsibility to ensure compliance with contract requirements, such as but not limited to, acceptance, inspection and delivery. The contract administrator will serve as liaison between Santa Maria ISD Business Office Department and the successful bidder.

44. PURCHASE ORDER: A purchase order(s) shall be generated by Santa Maria ISD to the successful bidder. The purchase order number must appear on all itemized invoices and packing slips.Santa Maria ISD will not be held responsible for any orders placed/delivered without a valid current purchase order number.

45. PACKING SLIPS or other suitable shipping documents shall accompany each special order shipment and shall show: (a) name and address of successful bidder, (b) name and address of receiving department/campus and/or delivery location, (c) Santa Maria ISD Purchase Order number, and (d) descriptive information as to the item(s) delivered, including product code, item number, quantity, number of containers, etc .

46. Products supplied under this contract shall be subject to SMISD approval. Items found defective or not meeting specifications shall be picked up and replaced by the successful bidder at the next service date at no expense to Santa Maria ISD. If item is not picked up within one (1) week after notification, the item will become a donation to Santa Maria ISD for disposition.

47. WAGES: Successful bidder shall pay or cause to be paid, without cost or expense to Santa Maria ISD, all Social Security, Unemployment and Federal Income Withholding Taxes of all employees and all such employees shall be paid wages and benefits as required by Federal and/or State Law.

48. BIDDERS MUST SUBMIT chemical content literature and/or specifications and Material Safety Data Sheets with their bid for evaluation where applicable. Failure to comply with this requirement could eliminate bidders from consideration on item or items concerned.

49. WARRANTY: Successful bidder shall warrant that all items/services shall conform to the proposed specifications and/or all warranties as stated in the Uniform Commercial Code and be free from all defects in material, workmanship and title. Detailed explanation of warranties must be provided with bid. Warranty will not begin until all components are installed and accepted by Santa Maria ISD.

50. VENUE: This agreement will be governed and construed according to the laws of the State of Texas. Both parties agree that venue for any litigation arising from this contract shall lie in Cameron County, Texas.

51. ASSIGNMENT: The successful bidder shall not sell, assign, transfer or convey this contract, in whole or in part, without the prior written consent of Santa Maria ISD.

52. SILENCE OF SPECIFICATION: The apparent silence of these specifications as to any detail or the apparent omission from it of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of these specifications shall be made on the basis of this statement.

53. Force Majeure: Neither party shall be liable in damages for any delay or default in the performance of this contract, if such delay or default is caused by conditions beyond its control including, but not limited to Acts of God, government restrictions, wars, insurrections, and/or any other cause beyond the reasonable control of the party whose performance is affected.

54. EQUAL EMPLOYMENT OPPORTUNITIES LAWS. Successful bidder will be required to comply with applicable equal employment opportunity laws and regulation.

55. PAYMENT will be made upon receipt and acceptance by Santa Maria ISD of item(s) ordered and receipt of a valid invoice, in accordance with the State of Texas Prompt Payment Act, Chapter 2251, Government Code VTCA.

56. INVOICES shall show purchase order number, copy of signed delivery ticket and bid name and shall be mailed directly to:

Santa Maria ISD
Accounts Payable
P O Box 448
Santa Maria, TX 78592

57. ALL VENDORS OR CONTRACTORS DOING BUSINESS WITH Santa Maria ISD must submit a Conflict of Interest Questionnaire if required no later than the 7th Business Day after the date the person becomes aware of facts that require the statement to be filed as required by Local Government Code, Section 176.006. The form may be downloaded from the district's purchasing website.

58. ALL VENDORS OR CONTRACTORS DOING BUSINESS WITH Santa Maria ISD must have Form W-9 Request for Taxpayer Identification Number and Certification on file.

59. ALL VENDORS MUST ALSO INCLUDE a Felony Conviction Notification as required by Senate Bill No. 1, Section 44.034, Notification of Criminal History, Subsection (a) with your bid.

60. ANY QUESTIONS CONCERNING THIS INVITATION TO BID AND SPECIFICATIONS SHOULD BE DIRECTED TO THE BUSINESS OFFICE DEPARTMENT AT (956) 565-6308.

61. NOTE: Santa Maria ISD does not discriminate on the basis of sex, race, disability, color or national

DEVIATIONS FORM

If the Undersigned Vendor intends to deviate from the specifications set forth by utilizing any different materials, items, treatments, finishes, tailoring details, under construction, etc., contrary to those listed as standards in the specifications, then the Vendor shall enter "No deviations" on this form. The Proposer then assures the Buyer of their full compliance with the specifications and conditions set forth.

FAILURE TO LIST SUCH DEVIATIONS, IN DETAIL, WILL RESULT IN DISQUALIFICATION

OF THE PROPOSAL/BID.

_____

(PRINT NAME)

_____ _____

AUTHORIZE SIGNATURE: DATE:

_____ _____

ADDRESS CITY/ST ZIP

(_____)_____ (_____)_____

FELONY CONVICTION NOTIFICATION

State of Texas Legislative Senate Bill No. 1, Section 44.034, Notification of Criminal History, Subsection (a), states "a person or business entity that enters into a contract with a school district must give advance notice to the district if the person, owner or operator of the business entity has been convicted of a felony."

The notice must include a general description of the conduct resulting in the conviction of a felony.Subsection (b) states "a school district may terminate a contract with a person or business entity if the district determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in the conviction." The district must compensate the person or business entity for services performed before the termination of the contract.

THIS NOTICE IS NOT REQUIRED OF A PUBLICLY -HELD CORPORATION, BUT THE COMPANY REPRESENTATIVE MUST CHECK OFF A SELECTION BELOW (A, B OR C)

I, the undersigned agent for the firm named below, certify that the information concerning notification of felony convictions has been reviewed by me and the following information furnished is true to the best of my knowledge.

VENDOR'S NAME: _____

AUTHORIZED COMPANY OFFICIAL'S NAME (PRINTED):

_____

AUTHORIZED COMPANY OFFICIAL'S

SIGNATURE _____

Date: _____

PLEASE CHECK OFF A SELECTION BELOW

( ) A. My firm is a publicly-held corporation; therefore, this report requirement is not applicable.

( ) B. My firm is not owned and/or operated by anyone who has been convicted of a felony.

( ) C. My firm is owned or operated by the following individual (s) who has/have been convicted of a felony.

Name of Felon (s) _____

Details of conviction(s):_____

NON-COLLUSIVE CERTIFICATE

By submission of this bid or proposal, the Vendor certifies that:

(a) This bid or proposal has been independently arrived at without collusion with any other vendor or with any competitor;

(b) This bid or proposal has not been knowingly disclosed and will not be knowingly disclosed, prior to the opening of the bids, or proposals for this project, to any other vendor, competitor or potential competitor;

(c) No attempt has been or will be made to induce any other person, partnership or corporation to submit or not to submit a bid or proposal;

(d) The person signing this bid or proposal certifies that he has fully informed himself regarding the accuracy of the statements contained in this certification, and under the penalties being applicable to the vendor as well as to the person signing in its behalf.

I, _____, have read the standard terms and conditions,

(Print/Type Name of Company Officer)

I fully understand them, and will fully execute them if I am awarded this proposal.

Company _____

Address _____

City, State, Zip Code _____

Telephone Number _____

_____

Authorized Signature

_____

Title

_____

References

Please provide at least three references preferably school districts that your company has done work for in the past.

Business /District Name _____

Contact_____

Phone Number _____

Business /District Name _____

Contact_____

Phone Number _____

Business /District Name _____

Contact_____

Phone Number _____

Specifications

1. Proposed Effective Date:

a. The contract shall be for a period of one year, beginning August 1, 2026 through July 31, 2027.

b. There will be an option to renew annually for two additional, one year contracts if the renewal is agreed to in writing by both parties. In no instance shall this extension be considered automatic.

2. Company Eligibility:

a. All proposals must include the name of the insurance company, which must have a general policyholder's rating of A- or better as published by A.M. Best's Key Rating Guide, latest edition.

b. The insurance company must be authorized to do business in the State of Texas.

c. The successful proposer must be in the position to supply audited financial statements on an annual basis, prepared by a national auditing firm.

3. Other Information:

a. Coverage shall be for one year beginning at 12:01 A.M., August 1, 2026, and shall extend until 12:00 midnight, July 31, 2027. Premium rates shall be guaranteed for this initial one-year period.

b. Any plan of insurance, additional information, different methods of handling coverage, increased protections, etc., not in the specifications, will be welcomed, but must be submitted separately as an alternate proposal. Consideration will require supporting information and reasoning for better or more reasonable coverage for the District.

c. Copies of all policy forms and endorsements must be furnished along with your proposal.

d. The basis of premium payment should be outlined.

e. It is the intent of SANTA MARIA INDEPENDENT SCHOOL DISTRICT to award the proposal to one carrier who can provide all lines of coverage in a package format.

Preference will be given to proposers willing and able to place the entire package with one company. Each proposal should include the three benefits listed below:

f. Student accident insurance provides:

(1) Student Athletic/UIL coverage for students in grades 6 through 12 including athletic activities “Athletic” Physical Education Classes, Band, and Cheerleading etc as long as it is a supervised, sponsored sport, game or activity.

(3) Catastrophic Insurance Coverage and Additional Death and Disability Benefits for interscholastic sports, including: football, band, cheerleaders, majorettes and drill (dance) teams and to include intramural sports, gym classes, and non-sport extracurricular activities. Preference will be given to any carrier that can offer a $5,000,000 or greater Catastrophic Maximum Benefit. Catastrophic Coverage is requested to be provided on a “Class II “basis.

4. Underwriting Information:

a. Total number of students

Middle School (grades 7-8) and High School (grades 9-12)

Athletic/Other Enrollment Numbers:

	High School		Middle School(7th-8th)	
Sport	**Male**	**Female**	**Male**	**Female**
Basketball	12	12	12	12
Football	35	0	25	0
Track	10	12	6	4
Cross Country	8	6	6	4
Track				
Volley Ball	0	10	8	8
Total Athletes	65	40	57	28
Band	15	15	6	6
Dance/Flag	0	10	0	7
Cheerleading	0	8	0	8
Golf	5	0	0	0
Powerlifting	5	5	0	0
Soccer	21	0	15	0
# of Schools	1		1	

b. UIL Classification: 2A

c. Premiums and Claim Loss Data History

Year Company Premium Losses Paid Thru Date

CLAIMS LOSS RUNS REPORT

STUDENT/ATHLETIC ACCIDENT INSURANCE
CLAIMS ANALYSIS

Santa Maria ISD

2025-2026					
Policy Year		Premium	Total Claims Paid	Ending	%
		Received	Incurred,Pending	Date	Loss
From:	To:	Y-T-D	and Unreported		Ratio
8/1/2025	7/31/2026	$32,163	$5,132	June 2026	16%
Report povided by Texas Kids First, June 16, 2026					

2024-2025					
Policy Year		Premium	Total Claims Paid	Ending	%
		Received	Incurred,Pending	Date	Loss
From:	To:	Y-T-D	and Unreported		Ratio
8/1/2024	7/31/2025	$24,000	$62,446	April 2025	260%

2023-2024					
Policy Year		Premium	Total Claims	Ending	%
		Received	**PAID**	Date	Loss
From:	To:	Y-T-D			Ratio
8/1/2023	7/31/2024	$17,990	$33,781	April 2025	188%

2022-2023					
Policy Year		Premium	Total Claims	Ending	%
		Received	**PAID**	Date	Loss
From:	To:	Y-T-D			Ratio
8/1/2022	7/31/2023	$17,990	$21,672	April 2025	120%
Report Provided by Student Assurance Services Inc./The Brokerage Store Inc 05/01/2025					

5. Specifications:

The District desires plan benefits that meet or exceed current plan benefits (see attached).Favorable consideration will be given to those proposals which are close to or meet the following benefit levels:

• Heat Exhaustion/Heat Stroke - treated as covered accident.

• Dental coverage included in plan

• Accidental death and dismemberment coverage included in plan

• The District favors participation in a PPO network. Please include a copy of the

Provider directory with your proposal or their website address

• The District REQUIRES a detailed (monthly, preferred) loss run for all claim forms submitted (please submit a sample copy of detailed loss run)

6. Senate Bill 9

In accordance with Senate Bill 9, Santa Maria ISD is requiring that all potential vendors, consultants and/or contractors be subject to either fingerprinting and/or background checks. Santa Maria ISD Administration will determine if potential vendors and contractors are required meet these guidelines. The cost of any fingerprinting and/or background checks will be the responsibility of the consultant.

7. References

Consultants must complete and submit three (3) references. This attachment is part of the evaluation criteria and will be weighted accordingly.

8. Submittal of Information

Any questions regarding this RFP may be submitted in writing via e-mail to:
Salvador Acosta, Director of Operations & Special Programs
sacosta@smisd.net
The deadline for all questions is Wednesday, July 07, 2026 at 02:00 P.M.

9. Evaluation Criteria

According to the Texas Education Code, Subchapter B, Section 44.031 (b), in determining to whom to award a contract, the district will consider the following criteria:

No.	Criteria	Points
1	The Purchase Price- Cost of Services	60
2	Reputation of vendor and of the vendor's goods and services-References	10
3	The quality of the vendor's goods or servicesExperience in the related field with public school dsitricts, sample reports, and sample IEP.	10
4	the extent to which the goods or services meet the district's needs -availability of consultant(s)to provide services or address concerns on short notice(next day response	10
5	The vendor's past relationship with district	0
6	The impact on the ability of the district to comply with the laws and rules relating to Historically Underutilized Business	3
7	The total long term cost to the district to acquire the vendor's good or services	5
8	The vendor or the vendors ultimate parent company or majority owner has its principal place of business in this state	1
9	Any other relevant factor specifically stated in the request for bids or proposals-Licenses and/or certificates in the field being solicited	1
	Total	100

Per Texas Education Code, Subchapter B, Sec.44.031(b) * ALL CONTENTS PROVIDED IN THIS SOLICITATION, WILL BE CONSIDERED AS AN EVALUATION FACTO

REQUIRED PROPOSAL FORM

	OPION I	**OPTION II**
POLICY MAXIMUM/DEDUCTIBLE		
HOSPITAL SERVICES:		
Daily R&B		
Intensive Care R&B		
Emergency Room		
Misc Services		
Surgery		
Physician Visits		
Anesthesiologist		
Assistant Surgeon		
Inpatient Hospital Care & Service		
Radiology		
Diagnostic Imaging		
Nurse Service		
Dental Treatment		
Professional Ambulance Service		
Physiotherapy		
Orthopedic Appliances		
Eyeglasses		
Heat Exhaustion/Heat Stroke		

ACCIDENTAL DEATH AND DISMEMBERMENT BENEFITS

For loss of:

Life $ _____ $ _____

Both hands or both feet or both eyes $ _____ $ _____

One hand and one foot, one hand and one eye, or one foot and one eye

$_____ $_____ One hand or one foot

$_____ $_____

One eye $_____ $ _____

If within 100 days from the date of the accident, injuries cause dismemberment or death, the largest applicable indemnity will be paid in addition to benefits for medical expense.

PROPOSAL FORM (CONTINUED)
EXCLUSIONS AND LIMITATIONS

This plan does not cover, nor is any premium charged for:

Limitations

PROPOSAL FORM (PREMIUM RATES)

Individual Voluntary Student Plans	**Premium Rates per Student**	
	Option I	Option II
School time Plan	$ _____	$_____
Around-the-Clock Plan	$_____	$_____
Optional Extended Dental	$_____	$_____

SANTA MARIA INDEPENDENT SCHOOL DISTRICT

(Catastrophic Coverage) Schedule of Benefits

The benefits provided under this policy are indicated below:

CATASTROPHIC CASH & ACCIDENTAL DEATH & DISMEMBERMENT BENEFIT

CATASTROPHIC CASH MAXIMUM AMOUNT PER ACCIDENT $_____

Maximum Benefit Period $_____

Accidental Death Benefit Amount $_____

Accidental Death & Dismemberment Maximum Amount per Accident $_____

Principal Sum $_____

CATASTROPHIC DISABILITY BENEFIT

CATASTROPHIC DISABILITY BENEFIT OFFERED $_____

WAITING PERIOD BEFORE PAYOUT $_____

PAYOUT STRUCTURE INITIAL $_____

MONTHLY OR YEARLY _____

BENEFIT PERIOD (YEARS) _____

Proposal Questionnaire

1. The District currently has a PPO “No Balance Bill “plan. Please specify the PPO network, if any, which is included with your proposal. Also, please include a listing of providers located within a radius of 35 miles of zip code 78592.

2. Please indicate if the plan(s) you are proposing include a “ No Balance Bill “ provider arrangement, and provide a list of those providers within the same access radius and zip code as in #1. Please confirm if your PPO network providers who participate in the “No Balance Bill “networks accept plan benefit payments as payment in full.

3. Please indicate if your claim submission process is electronic, or paper based. If electronic, please describe in detail that process.

4. If proposing separate “ Base and CAT “ contracts, please fully describe the CAT initial notice of claim process, including what party bears responsibility for submitting the initial notice of CAT claim.