



RFP #3366-26

Excess Workers' Compensation Insurance

Issue Date: 6/19/2026

Questions Deadline: 6/26/2026 02:00 PM (CT)

Response Deadline: 7/14/2026 02:00 PM (CT)

Contact Information

Contact: Candace Schmitke-Senior Buyer/ Risk Management Ana

Address: Procurement Department
LISD Administrative Center
Room 220
1565A West Main Street
Lewisville, TX 75067

Phone: (972) 350-4748

Email: schmitkec@lisd.net

Event Information

Number: RFP #3366-26
Title: Excess Workers' Compensation Insurance
Type: Request for Proposal - Formal
Issue Date: 6/19/2026
Question Deadline: 6/26/2026 02:00 PM (CT)
Response Deadline: 7/14/2026 02:00 PM (CT)
Notes: The Lewisville Independent School District (LISD) is accepting proposals for Excess Workers' Compensation Insurance.

*****RFP submission deadline is Friday July 14, 2026*****

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Lewisville ISD's objectives are two-fold in maintaining a self-insured program for their Workers' Compensation and Employers' Liability Exposure. They are:
Reduce workers' compensation costs by self-insuring a portion of its workers' compensation risk to reduce direct costs and maximize indirect cost savings by capturing the cash flow savings associated with self-insurance.
Establish a stable workers' compensation program and enter into a long-term relationship with a financially strong stop-loss carrier.
All responses to this proposal shall be for a one (1) year agreement between the District and the provider with four (4) successive one (1) year extensions, based on the long-range needs of the District and mutual consent of both parties not to exceed five (5) years total. **The effective date of the Excess Workers' Compensation Insurance will be September 1, 2026.**

- **Initial Term: September 2026 – August 2027**
- Second Term : September 2027 – August 2028
- Third Term: September 2028 – August 2029
- Fourth Term: September 2029 – August 2030
- Fifth and Final Term: September 2030 – August 2031

****Responses will not be opened or read publicly. Responses will not be opened until after RFP #3366-26 closes.****

Billing Information

Address: TX
Email: invoices@lisd.net

Bid Activities

Release of Proposal	6/19/2026 7:00:00 AM (CT)
Deadline for Questions	6/26/2026 2:00:00 PM (CT)
Respond to Questions	7/2/2026 5:00:00 PM (CT)
Deadline for Submittal	7/14/2026 2:00:00 PM (CT)

(Tentative) Recommendation to Board of Trustees

8/10/2026 7:00:00 PM (CT)

(Tentative) Effective Date of Award

9/1/2026 12:00:00 AM (CT)

Bid Attachments

W-9 Form - Rev 2024.pdf

W9 - v 2024

[Download](#)

LISD Terms and Conditions 071725.pdf

LISD Terms and Conditions 071725

[Download](#)

1295_Form_(unsworn_declaration) 082522.pdf

Certificate of Interested Parties (Form 1295)

[Download](#)

LISD Public Records Agreementdocx.pdf

LISD Public Records Agreement

[Download](#)

TX_NDPA_V1_with_exhibit.pdf

National DPA

[Download](#)

preemployment-preservice-affidavit-tec-22a055 (1) (1).pdf

PRE-EMPLOYMENT OR PRE-SERVICE AFFIDAVIT FOR EDUCATIONAL ENTITIES

Pursuant to Texas Education Code (TEC) §22A.055, a person applying for employment with or who will act as a service provider for an educational entity (school district, district of innovation, open-enrollment charter school, other charter entity, regional education service center, or shared services arrangement) must submit, using a form adopted by the agency, a pre-employment or pre-service affidavit.

Please fill out this affidavit and attach it to your bid response in the response attachments tab.

[Download](#)

CIQ Form 2015.pdf

Conflict of Interest Questionnaire Form

[Download](#)

Loss Run 2-28-26.pdf

Loss run 2-28-26

[Download](#)

RFP_#3366-26_Excess_Workers_Compensation_Insurance_Exhibit_G_(2) (1).pdf

Special Conditions or Exposures

[Download](#)

Active Employees by Location for Schmitke Bid - 6.18.26.pdf

Active Employees as of 6/18/2026

[Download](#)

LISD_Excess_Workers_Comp_Payroll_Exhibit_B_Updated (1) (1).pdf

Actual Payroll by Classification

[Download](#)

RFP_#2820-21_Excess_Workers_Compensation_Insurance_Exhibit_A_(2).pdf

Insurance Pricing Sheet

[Download](#)

Requested Attachments

Texas Data Privacy Agreement

Please save as Company Name TDPA [Example: ABC Company TDPA] **PLEASE SAVE AS A PDF**

Pricing

(Attachment required)

Price list **MUST** be included or proposal may not be considered. Vendors shall submit pricelist with the Proposal in a readily available and readable electronic format, with Excel or a searchable PDF preferred.

NOTE: IF DETAILED INFORMATION IS NOT SUBMITTED, PROPOSAL MAY NOT BE CONSIDERED.

Please save as Company Name Pricing [Example: ABC Company Pricing] **PLEASE SAVE AS A PDF**

Form 1295

(Attachment required)

Please save as Company Name 1295 [Example: ABC Company 1295] **PLEASE SAVE AS A PDF**

W-9 Form

(Attachment required)

Please save as Company Name W9 [Example: ABC Company W9] **PLEASE SAVE AS A PDF**

Vendor Insurance Acknowledgment

(Attachment required)

Please save as Company Name Vendor Insurance Acknowledgement [Example: ABC Company Vendor Insurance Acknowledgement] **PLEASE SAVE AS A PDF**

LISD Public Records Agreement

(Attachment required)

Please save as Company Name Public Records Agreement [Example: ABC Company Public Records Agreement] **PLEASE SAVE AS A PDF**

PRE-EMPLOYMENT OR PRE-SERVICE AFFIDAVIT

(Attachment required)

PRE-EMPLOYMENT OR PRE-SERVICE AFFIDAVIT FOR EDUCATIONAL ENTITIES

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Please fill out this affidavit and attach it to your bid response in the response attachments tab.

Conflict of Interest Questionnaire Form

(Attachment required)

Only required if applicable.

Contracts

(Attachment required)

Vendors should list specific services included in the pricing. (See attribute 23)

Safeguarding and Securing Confidential Information

(Attachment required)

Include with your proposal a detailed description of how you safeguard and secure confidential information on our employees and their dependents, and what your procedures are in the event of a data breach.

Organization Information

(Attachment required)

a. Primary contact proposed for this account (Lewisville ISD) b. Years of experience in writing workers' compensation coverages c. Years of experience in servicing and placing excess workers' compensation insurance coverages d. Years with the company e. Contact information (title, phone, fax, address, e-mail)

Implementation Timetable and Materials

(Attachment required)

(See attribute 24)

Bid Attributes

1 Vendor Communication Process

All vendor communications must be directed in writing to: Candace Schmitke, Senior Buyer/ Risk Management Analyst, Administrative Center, Procurement Department 1565-A West Main St., Lewisville, TX 75067 Telephone: (972) 350-4748 Email:schmitkec@lisdt.net

2 Submission Response

Electronic bids and manual bids must be received in the Lewisville Independent School District Procurement Department office before the hour and date specified. **DO NOT FAX OR EMAIL YOUR BID!**

If due to inclement weather, natural disaster, or for any other cause the District office location where bids/proposals are to be submitted is closed on the due date, the deadline for submission shall automatically be extended until the next District business day on which the office is open, unless the bidder is otherwise notified by the District. The time of day for submission shall remain the same.

Electronic bids are to be submitted in the Lewisville ISD online procurement system (the IonWave bidding system) unless otherwise specified in the bid document. Forms are provided for download to be completed and then attached to the bid document.

Manual bids shall be completed on the forms provided. All prices must be typed or written in ink. Bids written in pencil will not be accepted. Each manual bid shall be placed in a separate envelope, sealed and properly identified with the bid title and the time and date to be opened as shown in the "Notice to Bidders". Please note that the words "proposal" and "bid" may be used interchangeably throughout this packet but shall have the same meaning. The words "bidder" and "vendor" may also be used interchangeably

Only one format is needed. For any questions, please contact the Procurement Department at 972-350-4749.

3 Non-Collaboration Agreement

It is hereby stated and serves as notice that if any collaboration was provided in the development of this bid and/or the outline and details of the bid specifications of this bid and any related documents, that the vendor, company, or firm will not be eligible or considered for award of this bid.

Do you understand and agree (Yes / No)?

☐ Yes ☐ No

(Required: Check only one)

4 Length of Contract

The initial term of this proposal shall be from September 2026 - August 2027.

Dependent on the long-range needs of the District, this bid will automatically renew for the terms listed below. If vendor does not wish to renew, or wishes to renew with new terms and conditions, please contact LISD within 90 days of the renewal term. There will be four successive renewals, each consisting of a one year term.

Initial Anticipated Contract Term: September 2026 - August 2027

Second Term: September 2027 - August 2028

Third Term: September 2028 - August 2029

Fourth Term: September 2029 - August 2030

Fifth and Final Term: September 2030 - August 2031

5 Scope of Work

The Lewisville Independent School District (LISD) is accepting proposals for Excess Workers' Compensation Insurance.

*****RFP submission deadline is Friday July 14, 2026*****

Lewisville ISD's objectives are two-fold in maintaining a self-insured program for their Workers' Compensation and Employers' Liability Exposure. They are:

Reduce workers' compensation costs by self-insuring a portion of its workers' compensation risk to reduce direct costs and maximize indirect cost savings by capturing the cash flow savings associated with self-insurance.

Establish a stable workers' compensation program and enter into a long-term relationship with a financially strong stop-loss carrier.

All responses to this proposal shall be for a one (1) year agreement between the District and the provider with four (4) successive one (1) year extensions, based on the long-range needs of the District and mutual consent of both parties not to exceed five (5) years total. **The effective date of the Excess Workers' Compensation Insurance will be September 1, 2026.**

• ****Responses will not be opened or read publicly. Responses will not be opened until after RFP #3366-26 closes.****

6 Proposal Opening

Any proposal received later than the specified time, whether delivered in person or by any other method shall be disqualified. Any questions pertaining to the proposal procedures should be addressed to the Procurement Department at 972-350-4749.

If the District office location where bids/proposals are to be submitted is rendered closed due to inclement weather, natural disaster, or for any other cause including if the electronic bid system is unavailable on the due date, the deadline for submission shall be extended until the next district calendar business day, unless the bidder is otherwise notified by the District. The time of day for submission shall remain the same.

7 Proposal Preparation and Response Costs

All travel, proposal preparation costs, and any costs related to the Vendors submitting a response to this proposal request shall be borne by the Vendor. The District will not be responsible for any vendor expenses attributable to the preparation or response to this proposal request.

8 LISD Demographics

Lewisville ISD encompasses 127-square miles and serves 47,000 students from thirteen municipalities including Argyle, Carrollton, Coppell, Copper Canyon, Double Oak, Flower Mound, Frisco, Grapevine, Highland Village, Hebron, Lewisville, Plano and The Colony.

9 Introduction

There are attributes, including this one, associated with this proposal. Some are notes and require no response, but most have a required response. *****Please select each page on the right-hand side of the blue bar below (at the bottom of this list of attributes) in order to view the next page of Bid Attributes.*****

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Communications Statement

Communications: Contact between vendors and LISD personnel during the proposal process or evaluation process of this bid is prohibited. Any attempt by vendors during the proposal process to contact LISD personnel may result in disqualification. All communication shall go through the Procurement Department during this competitive process. All questions received and the corresponding answers will be distributed to all bidders. No verbal responses will be provided. The deadline for questions about this proposal is stated in the Bid Activities and the District will not respond to questions after this time and date. Response to questions will be posted in the form of an addendum to this request for proposal. The Vendors will be responsible for checking the website for any posted addenda.

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PROPOSAL SPECIFICATIONS

PROPOSAL SPECIFICATIONS

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Section I - Description of Risk

Lewisville ISD is located in 13 cities (Lewisville, Highland Village, Flower Mound, The Colony, Double Oak, Copper Canyon, Hebron and parts of Argyle, Carrollton, Plano, Frisco, Coppell, and Grapevine.) The District is on the north side of the greater metropolitan Dallas area. The District's estimated 2021-2022 payroll is \$361,534,094. The District employs approximately 7,096 employees. Additionally, an automated substitute calling system has enrolled approximately 747 substitutes who are on-call per District need as well as about 406 temporary employees.

The District consists of 76 locations that house employees. Exhibit "E" provides those locations.

The District has been self-funded for Workers' Compensation since September 1, 1990. The District contracts with a third party for custodial. As a result, the District does not employ custodians. The District has approximately 46,000 students.

The Benefits Administrator is responsible for the District's workers' compensation program. The District's Board of Trustees is ultimately responsible for District programs.

Claims Administrative Services (CAS) is the District's current Third Party Administrator for Workers' Compensation claims.

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Section II - General Policy Conditions

1. Named Insured and Address:

Lewisville Independent School District
1565 West Main St.
Lewisville, TX 75067

2. Limits of Liability

Section A - Coverage: Workers' compensation coverage at statutory limits

Section B - Coverage: Employer's liability limit of \$1,000,000

3. Cancellation by Company

Because of the time that would be required to replace insurance by use of competitive quotes, an insurer must agree by policy endorsement or by letter of agreement not to cancel, decline to renew, or effect any material change in policy term, condition or rate without one-hundred twenty (120) days prior written notice to the Named Insured, except in case of nonpayment of premium.

The agent should insist on this condition.

4. Subrogation Waiver

The following subrogation waiver clause must be included in the policy:

"It is agreed that this insurance company hereby waives any right of subrogation against any Board or Commission of the Named Insured, or to elected or appointed officials or employees."

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Proposed Self-insured Retentions - Pricing

The proposed self-insured retentions are designed to allow the District to self-fund normal expected workers' compensation costs. Self-insured retentions are proposed both on an occurrence and annual aggregate basis. Both per occurrence and annual aggregate retentions should include all allocated claims expenses and legal costs which would accumulate in the self-insured retentions.

Suggested Retention Levels: An analysis of the District's loss histories and premiums found in Exhibits C and D suggest the following self-insured retentions. Please quote the following options (Exhibit A):

- Per occurrence SIR
 - ◊ \$400,000
 - ◊ \$500,000
 - ◊ \$600,000
- In addition to the various per occurrence SIR's, please note the additional premium to provide an annual aggregate SIR of 1.5 times manual premium. Proposers are encouraged to offer various aggregate options.
- Historical Loss and Premium Data: Exhibit C summarizes the District's workers' compensation loss history and claims count summary.

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Section III - Underwriting Information

1. Estimated Payroll and Premium Information
 - ◊ Exhibit B provides actual payroll by classification for the period of 2017 - 2021. For comparison purposes, quotes should use actual payrolls and rates as shown in these specifications.
2. Loss History & Claims Frequency
 - ◊ Exhibit C provides loss history from 2010 to present and provides claims count summary.
3. Premium and Carrier History
 - ◊ Exhibit D provides premium and carrier history for the period 2017 - 2021.
4. Locations, Addresses, and Number of Employees by Location
 - ◊ Exhibit E provides all locations and service descriptions within the District.
5. Excess Claims
 - ◊ Exhibit F provides all open claims over \$50,000.
6. Special Conditions or Exposures
 - ◊ Exhibit G provides a list of all special conditions or exposures related to the District.

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Qualifications

1. Must be licensed and/or authorized to do business in the State of Texas.
2. Must have A.M. Best Rating: All insurance companies must have an A.M. Best rating of A- or better.
3. Demonstrated a history of strong performance with school districts in the State of Texas.
4. Must have at least five (5) years of experience in writing Texas workers' compensation coverages.
5. Must have experience in serving and placing excess workers' compensation insurance coverage for self-insured entities.
6. Both agent and insurer shall be in good standing with the Texas Department of Insurance, the Texas Secretary of State, and the Texas Comptrollers' Office.
7. Must attach a brief biography describing the experience of the person assigned to handle Lewisville ISD's account.
8. Proposers must have an Errors and Omissions policy with a minimum limit of \$1,000,000 per occurrence. Proof of coverage must be attached to your proposal.

****Proper qualifications must be included as an exhibit to the proposal.****

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7**Unique Characteristics and Qualifications**

Please comment on any characteristics of your organization that are considered unique in the industry.

(Required: Maximum 4000 characters allowed)

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8**Organization Information**

1. Attach an organizational chart for the proposed account manager and service team assigned to LISD.
2. Attach the following information for each team member:
 - ◊ Primary contact on this account
 - ◊ Years of experience in writing workers' compensation coverages
 - ◊ Years of experience in servicing and placing excess workers' compensation insurance coverages
 - ◊ Years with the company
 - ◊ Contact information (title, phone, fax, address, e-mail)

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9**PROPOSAL QUESTIONS****PROPOSAL QUESTIONS**2
0**Home Office Information**

Provide your Name, Address, City, State, Zip Code and Telephone number of home office of firm.

(Required: Maximum 1000 characters allowed)

2
1**Who will be assigned to District**

Identify the specific individuals who will be assigned to the District. Provide a brief bio for each of them, highlighting relevant experience with similar clients. Can attach if necessary.

(Required: Maximum 4000 characters allowed)

2
2**Safeguarding and Securing Confidential Information**

Include with your proposal a detailed description of how you safeguard and secure confidential information on our employees and their dependents, and what your procedures are in the event of a data breach.

2
3**Contracts**

Vendors should list specific services included in the pricing. **Please attach.**

2 4 Implementation Timetable and Materials

Please provide a detailed implementation timetable, including an outline of the activities you expect to be performed prior to the stated effective date, completion dates, and the individuals or groups who will have major responsibility for each activity, including:

1. Detailed transition plan
2. Description of any added value services proposed
3. Detail regarding extent and quality of loss control assistance - must provide complete description of program(s) offered
4. Description of benchmarking reporting assistance

2 5 Acceptance

LISD reserves the right to accept or reject any or all of the proposals submitted, waive minor technicalities, and accept the offer(s) most advantageous to the District. Contract, to awarded vendor(s), will be based on the determined "Best Value for the District." The Board of Trustees reserves the right to reject any/or all proposals and to approve any proposal deemed most advantageous to Lewisville Independent School District and to waive any informalities in offering.

2 6 Award Statement for Proposal

This Proposal may be awarded to one or multiple vendors by line item, section, or package as determined to be the best value to Lewisville Independent School District. LISD reserves the right to negotiate with any or all respondents and accept or reject any and/or all proposals, to waive any formalities and/or irregularities and to award in the best interest of the District.

2 7 Contract

Contract shall be put into effect by means of a purchase order(s) executed by the District after proposal has been awarded. Transfer of Contract by vendor is prohibited unless approved by the LISD Procurement Department.

By submitting a response, the Vendor represents that the person responding is authorized to enter into a resulting Contract on its behalf. This proposal request and its attachments, the Vendor's response and response attachments, any additional amendments/Contract executed by both parties pursuant to this proposal request or any resulting contract, and the LISD purchase order constitute the entire contract. A Contract shall be put into effect by means of a LISD purchase order(s) executed by the District, after the Vendor has been awarded by the LISD Board of Trustees. Transfer/Assignment of Contract by the Vendor is prohibited unless agreed upon in writing by the LISD Procurement Department.

The order of precedence shall be:

- 1) The constitution, statutes, and laws of the State of Texas
- 2) LISD issued additional signed addendums/agreements signed by both parties and pursuant to the proposal
- 3) LISD's purchase order
- 4) The proposal request
- 5) Vendor's attribute and line item responses to the proposal request
- 6) All attachments provided by LISD in the proposal request or any additional references by LISD
- 7) Vendor's response to this proposal request
- 8) All additional attachments to the proposal response by the responding Vendor.

The proposal or any resulting agreement may not be modified, amended or supplemented except by written agreement signed by an authorized representative of each party. Lewisville ISD Board Policy dictates the authorized representative for Lewisville ISD.

2 8 Cancellation of a purchase order or agreement

Lewisville ISD may terminate or cancel any Purchase Order or agreement at any time, with or without cause, by providing seven (7) business days advance written notice to the Vendor. If a purchase order or Agreement is terminated in accordance with this Paragraph, LISD shall only be required to pay the Vendor for goods or services delivered to LISD prior to the termination and not otherwise returned following Vendor's return policy. If LISD has paid Vendor for goods or services not yet provided as of the date of termination, Vendor shall immediately refund such payment(s).

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Contract Dispute Resolution

All disputes arising in connection with the Contract formed as a result of this proposal shall first be resolved through good faith negotiation. If, after negotiating in good faith for a period of thirty (30) calendar days, the parties are unable to resolve the dispute, then each party may seek resolution by exercising any rights or remedies available by law or in equity.

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Proposal Disclosure

A. All proposals received shall remain confidential until a Contract resulting from this proposal is awarded by the LISD Board, thereafter the proposal shall be deemed a public record. In the event that a proposer desires to claim that portions of its proposal are exempt from disclosure, the proposer must mark such portions as "Confidential and Proprietary" and LISD may submit such information to the Texas Attorney General for a ruling as to whether the information is exempt from disclosure.

B. Until a Contract resulting from this proposal is executed, no employee, agent or representative of any proposer shall make available or discuss its proposal with the press, any elected or appointed official or officer of LISD, or any employee, agent, or other representative of LISD, unless specifically allowed to do so in this proposal or in writing by LISD for the purposes of clarification, evaluation and/or negotiation.

C. Proposers shall not issue any news release(s) or make any statement to the news media pertaining to this proposal or any proposal and/or Contract or work resulting there from without the prior written approval of LISD, and then only in cooperation with LISD.

D. Please complete the LISD Public Records Agreement, in the Attachments tab, and submit it with your bid response.

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Right to Terminate

The District has the right to terminate this Contract for convenience, without penalty, if the District fails to appropriate funds or provide for a renewal of a Contract, following delivery of notice to the vendor within (15) days specifying the extent to which performance here-under is terminated and the date upon which such termination becomes effective.

The absence of appropriated or other lawfully available funds shall render the Contract Award null and void to the extent funds are not appropriated or available and any Deliverables delivered but unpaid shall be returned to the Vendor.

The District shall provide the Vendor written notice of the failure of the District to make an adequate appropriation for any fiscal year to pay the amounts due under the Contract Award, or the reduction of any appropriation for any fiscal year to pay the amounts due under the Contract Award, or the reduction of any appropriation to an amount insufficient to permit the District to pay its obligations.

The District's payment obligations are payable only and solely from funds appropriated and available for the purpose of the purchase.

Any Purchase Order resulting from a request for proposal is contingent upon the continued availability of appropriations and is subject to cancellation, without penalty, either in whole or in part. If funds are not appropriated by the Lewisville ISD Board of Trustees or otherwise not made available to the District.

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Renewal of Agreements

The scheduled Contract termination date shall be the last date of the month of the last month of the Contract's legal effect.

Example: *If the Contract is scheduled to end on May 23, the anniversary of the award, it would actually be extended to May 31 in the last month of the last year the Contract is active.*

3 Renewals

3

This bid will **automatically renew** depending on the long-range needs of the District, and providing that vendor(s) and Lewisville ISD remain in good standing. Awarded vendor(s) shall submit in writing, no later than (90) ninety days prior to renewal date, any changes in pricing or procedures or cancel notification if vendor does not want to renew the bid.

Lewisville ISD has the option to extend this RFP at the end of the performance period for up to 90 days if determined to be in the best interest of the district to ensure availability of products and/or services.

3 Survival Clause

4

All applicable sales, supplemental agreements, Contracts, software license Contracts, warranties or service agreements that were entered into between the Vendor and LISD under the terms and conditions of this Contract, shall survive the expiration or termination of this Contract. All Orders, Purchase Orders issued or Contracts executed by LISD and accepted by the Vendor prior to the expiration or termination of this Contract, shall survive expiration or termination of the Contract, subject to previously agreed terms and conditions agreed by the parties or as otherwise specified herein relating to termination of this Contract.

3 Oral Statement

5

No oral statement of any person shall modify or otherwise change, or affect the terms, conditions, or specifications stated in the resulting Contract.

3 Applicable Law and Venue

6

Any resulting Contract is governed by, and subject to, the laws of the State of Texas without regard to conflict of law principles. For purposes of litigating any dispute that arises directly or indirectly from the relationship of the parties, State of Texas shall be the exclusive jurisdiction and any such litigation shall be conducted only in the courts of Denton County, Texas, or the federal courts for the United States for the Eastern District of Texas, and no other courts.

3 Severability

7

A declaration by any court, or other binding legal source, that any provision of the Contract formed out of this proposal is illegal and void, will not affect the legality and enforceability of any other provision of the Contract, unless mutually dependent.

3 No Waiver

8

If either party fails, at any time, to enforce any right or remedy available to it under a contract formed out of this Request for Proposal, that failure shall not be construed to be a waiver of the right or remedy with respect to any other breach or failure by the other party.

3 Bid Number on Quotes

9

Quotes may be requested by LISD locations and **quotes MUST include bid number RFP #3366-26** and any/all free items.

4 Quotes

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When getting a quote for products and/or services, using federal funds, the District shall obtain an adequate number of quotes from qualified vendors to make price comparisons and ensure that the best value is being provided to the District. Best value involves considering several factors, which may include but are not limited to price, quality, availability, delivery timing, support, and other relevant factors.

4 Duties of Vendor

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All specifications, terms, conditions, requirements, any other part of the proposal request, and if awarded the performance of the resulting Contract, regardless of the use of any employee, agent, subcontractor or third party acting on behalf of the Vendor, shall be fully upheld at the sole liability of the Vendor. It is the Vendor's responsibility to ensure that all aspects of this proposal request, or if awarded resulting Contract is adhered to. No third party Contracts, or any Contract between the Vendor and any third party, whether enacted or implied, shall bear any liability on the District.

4
2**Right to Use and Duplicate**

The Lewisville Independent School District reserves the right to use and duplicate as often as necessary any material that is submitted by the Vendor(s).

4
3**Payment for Goods and Services**

Payment for goods and services shall be governed by Texas Government Code 2251. Upon the Vendor's request, LISD shall furnish applicable tax exemptions that the District holds. The District may dispute an invoice by providing an explanation of the basis for the dispute. The Vendor shall be responsible in securing credit memos, as may be needed, for any problems that may occur during the length of any resulting contract for any reason, including but not limited to over priced items, incorrect shipping charges, standard returns, or any charges not in accordance with this Request for Proposal.

All invoices shall be submitted to the LISD Accounts Payable Dept. at invoices@lisd.net. All invoices must have PO number and RFP 3366-26 referenced on the invoice.

4
4**Additional General Conditions**

1. If any work is completed on district premises, when the Vendor arrives at any school/facility, it is required that the Vendor's representatives report to the District designated project manager, and to the main office when open, and sign in. If the Vendor is working multiple days, they are required to report on a daily basis and sign in. Proper clothing will be worn at all times. Sleeved t-shirts and long pants are the preferred attire with the company logo on the shirts. Any deviation from this will be reviewed for acceptance. LISD requires all vendors doing business on LISD property to have their employees and vehicles easily identifiable from company logos on items such as vehicles, ball caps, shirts, and/or ID badges.
2. Alcohol, tobacco, and firearms are prohibited on all district property.
3. Any damage done to LISD property or its customer's property is the sole responsibility of the Vendor.
4. Vendors response shall include any and all costs within their proposal response, including but not limited to costs of bonding, insurance, delivery, permits, specialized equipment, or any other cost necessary.
5. Any product provided is to be factory new, and carry full factory warranty. No refurbished units.
6. The Vendor shall be solely responsible for its use of any subcontractor or any third-party acting on behalf of the Vendor.
7. Once a project begins, the Vendor selected must finish the work.
8. Vendor is to adhere to all specifications within this proposal request or otherwise attached. Any instance where any requirement is unclear or not specified, it shall not affect adherence to any other specification, and the Vendor shall use commercially reasonable efforts to satisfy any such requirement.

4
5**Senate Bill 9**

Vendor accepts full responsibility for adhering to Senate Bill 9 requirements. At no time shall vendor(s) or vendor's employees, agents or subcontractors have unsupervised contact with students.

4
6**Government Code Chapter 2272 - Non-abortion provider or affiliate**

Pursuant to Texas Government Code Chapter 2272, the District is prohibited from contracting with any abortion provider or an affiliate of an abortion provider whereby the provider or affiliate receives something of value derived from state or local tax revenue. Any Contract entered into by the District is void if the prospective vendor has such a prohibited affiliation or contractual relationship.

By submitting a proposal in response to the request for proposal, you are certifying to the District that you or your company do not have such an affiliation or contractual relationship.

4 **PROHIBITION ON CONTRACTS WITH CERTAIN COMPANIES**

7

Sec. 2252.151. DEFINITIONS. In this subchapter: (1) "Company" has the meaning assigned by Section 806.001. (2) "Foreign terrorist organization" means an organization designated as a foreign terrorist organization by the United States secretary of state as authorized by 8 U.S.C. Section 1189. (3) "Governmental Contract" means a Contract awarded by a governmental entity for general construction, an improvement, a service, or a public works project or for a purchase of supplies, materials, or equipment. The term includes a Contract to obtain a professional or consulting service subject to Chapter 2254. (4) "Governmental entity" has the meaning assigned by Section 2252.001. Sec. 2252.152.

CONTRACTS WITH COMPANIES ENGAGED IN BUSINESS WITH IRAN, SUDAN, OR FOREIGN TERRORIST ORGANIZATION PROHIBITED. A governmental entity may not enter into a governmental Contract with a company that is identified on a list prepared and maintained under Section 806.051, 807.051, or 2252.153. Sec. 2252.153.

LISTED COMPANIES. The comptroller shall prepare and maintain, and make available to each governmental entity, a list of companies known to have Contracts with or provide supplies or services to a foreign terrorist organization. SECTION 2. Subchapter F, Chapter 2252, Government Code, as added by this Act, applies only to a Contract or purchase for which a governmental entity first advertises or otherwise solicits bids, proposals, offers, or qualifications on or after the effective date of this Act. SECTION 3. This Act takes effect September 1, 2017.

DO YOU OR YOUR COMPANY ENGAGE IN BUSINESS WITH IRAN, SUDAN, OR ANY FOREIGN TERRORIST ORGANIZATION? IF YES, LISD WILL NOT BE ABLE TO DO BUSINESS WITH YOUR COMPANY.

☐ YES ☐ NO

(Required: Check only one)

4 **Laws, Regulations, Standards, Licensing**

8

LISD requires vendor to certify that during the term of an award by the LISD resulting from this procurement process the Vendor will be in compliance with mandatory federal health and safety certifications, local, state or federal laws, regulations, standards, licensing, and policies.

Do you certify to comply with all mandatory federal health and safety certifications, local, state or federal laws, regulations, standards, licensing, and policies, as they apply to this Contract?

☐ Yes, I certify to comply

(Required: Check only one)

4
9**Not Boycott Israel****EVALUATION CRITERIA**

Texas Government Code 2271.002 requires that a governmental entity may not enter into a contract with a company for goods or services unless the contract contains a written verification from the company that it:

- does not boycott Israel; and
- will not boycott Israel during the term of the contract.

As amended by HB 793 (2019) *this section applies **ONLY** to a contract that:*

- is between a governmental entity and a company with 10 or more full-time employees; and
- has a value of \$100,000 or more that is to be paid wholly or partly from public funds of the governmental entity.

Texas Government Code 808.001 Definitions:

- "Boycott Israel" means refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations specifically with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory, but does not include an action made for ordinary business purposes;
- "Company" means a for-profit sole proprietorship, organization, association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or limited liability company, including a wholly owned subsidiary, majority-owned subsidiary, parent company, or affiliate of those entities or business associations that exists to make a profit. And as amended by HB 793 (2019), "except that the term does not include a sole proprietorship".

By signing below, I hereby depose and verify that my company does not and will not boycott Israel during the term of any resulting contract. Furthermore, my company shall indemnify and hold harmless Lewisville ISD, its officials and employees from any and all claims, damages, and costs of any nature based upon Lewisville ISD's reliance on this verification.

Select from the Drop-Down List below. This is your electronic signature:

☐ Company does NOT and will NOT boycott Israel ☐ Exemptions Apply per HB 793 (2019) Revisions

(Required: Check only one)

5
0**Felony Conviction Notification**

Texas Education Code, Section 44.034, Texas Education Code, 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 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 entity for services performed before the termination of the Contract."

Is your firm owned or operated by anyone who has been convicted of a felony?

☐ Yes ☐ No ☐ Publicly Held

(Required: Check only one)

5
1**Felony Conviction Details**

If your firm is owned or operated by anyone who has been convicted of a felony, please list their name and the details of the conviction. If none, please enter N/A (not applicable).

(Required: Maximum 1000 characters allowed)

5
2**Criminal Background Check Requirement**

If an employee of a vendor is covered under SB 9, the vendor must bear the burden of obtaining a national, fingerprint-based criminal history check. Under Section 22.0834 of the Education Code, the vendor is then required to certify to the district that the criminal history check has been performed. The vendor, not the district, is responsible for contacting DPS directly to set up an account for the purposes of obtaining criminal history record information. Under the statute SB 9, a vendor is required to conduct a criminal history review on an employee only when the following criteria have been met: *The employer has contracted with district to provide services. *The particular employee will have continuing duties relating to the Contract with the District. * The particular employee will have contact with students. A contractor or sub-contractor may not work on district property or any location the District deems a place where students are regularly present when *they have been convicted of a felony or misdemeanor involving moral turpitude, as defined by Texas law or any other offense the District believes might compromise the safety of student, staff or property.

A vendors violation of this section shall constitute substantial failure. If the Vendor is the person or owner or operator of the business entity, that individual may not self-certify regarding the criminal history record information and its review, and must submit original evidence acceptable to the District with this Contract showing compliance. Possession of firearms, alcohol and/or drugs, even in vehicles, is strictly prohibited on school/district property. The use of tobacco products are not allowed on school district property.

☐ Yes. Vendor certifies ☐ No, Vendor does not certify

(Required: Check only one)

5
3**Bidder's Certification**

Texas Government Code Chapter 2252 relates to bids by nonresident contractors. The pertinent portions of the Act are as follows: Section 2252.001(3) "Nonresident bidder" refers to a person who is not a resident. Section 2252.001(4) "Resident bidder" refers to a person whose principal place of business is in this state, including a contractor whose ultimate parent company or majority owner has its principal place of business in this state. Section 2252.002, as amended by H.B. 3648, 83rd Legislature (2013 Regular Session): "AWARD OF CONTRACT TO NONRESIDENT BIDDER. A governmental entity may not award a governmental Contract to a nonresident bidder unless the nonresident underbids the lowest bid submitted by a responsible resident bidder by an amount that is not less than the greater of the following:

(1) the amount by which a resident bidder would be required to underbid the nonresident bidder to obtain a comparable Contract in the state in which the nonresident's principal place of business is located; or
(2) the amount by which a resident bidder would be required to underbid the nonresident bidder to obtain a comparable Contract in the state in which a majority of the manufacturing relating to the Contract will be performed." Section 2252.002, as amended by H.B. 1050, 83rd Legislature (2013 Regular Session): "AWARD OF CONTRACT TO NONRESIDENT BIDDER: A governmental entity may not award a governmental Contract to a nonresident bidder unless the nonresident underbids the lowest bid submitted by a responsible resident bidder by an amount that is not less than the amount by which a resident bidder would be required to underbid the nonresident bidder to obtain a comparable Contract in:

(1) the state in which the nonresident's principal place of business is located;
or

(2) a state in which the nonresident is a resident manufacturer." ~~~ Is the Vendor a Resident Bidder of Texas as defined in Texas Government Code Section 2252.001(4)?

☐ Yes ☐ No

(Required: Check only one)

**5
4 Non - Collusion**

Vendor certifies under penalty of perjury that they are duly authorized to execute this Contract, that this company, corporation, firm, partnership, or individual has not prepared this bid in collusion with any other bidder, and that the contents of this bid as to prices, terms or conditions of said bid 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 bid.

Failure to certify will render bid non-responsive and will not be considered for award.

Does the Vendor certify?

☐ Yes. Vendor certifies ☐ No, Vendor does not certify

(Required: Check only one)

**5
5 Place of Business - # of Employees**

For the 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 Vendor's ultimate parent company or majority owner;

- 1) Has its principal place of business in the State of Texas;
OR
2) Employs at least 500 persons in Texas.

If you are not a Texas based business, do you have more than 500 employees in Texas?

☐ Texas based business ☐ Not Texas based business, more than 500 employees
☐ Not Texas based business, less than 500 employees

(Required: Check only one)

**5
6 Non-resident Bidder's Certification**

Non-resident Bidder of Texas as defined in Texas Government Code Section 2252.001(3) ~~~If your firm is not a Resident Bidder of Texas as defined in Texas Government Code Section 2252.001(4), indicate your firm's principal place of business City and State. If not applicable, please enter N/A (not applicable).

(Required: Maximum 1000 characters allowed)

**5
7 Conflict of Interest Questionnaire**

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the Vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the Vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the Vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

Does the Vendor have conflict of interest with Lewisville Independent School District?

☐ Yes ☐ No

(Required: Check only one)

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PROPOSAL SPECIFICATIONS5
9**Must attach in the response attachments tab**

Be sure to upload all required documents and forms to the "Response Attachments" Tab.

Required:

1. 1295 form
2. W9
3. Proposal
4. TX_NDPA - Data Privacy Agreement (DPA) - Only required if your company will have access to the LISD network, are providing software products, OR have access to or collect any district or student personally identifiable information.
5. Public Records Agreement
6. Preservice-affidavit - required if the vendor would be providing services during contract performance.

6
0**Final Evaluation Criteria - Points****Final Evaluation Statement - Points**

Final evaluations of this proposal will be based on the Texas Educational Code §44.031(b). Evaluation of pricing will be based on Unit Price value to be submitted on the "PRICING SHEET". Evaluation criteria for this RFP will be per the following:

Pricing Sheet - 40 Points

- Annual premium

Reputation of the Vendor and their goods and/or services - 12 Points (Area of References)

References or any other available information known to LISD may be used to score this criterion. (Area of Proposal Specifications - References)

DO NOT USE LISD OR LISD EMPLOYEES AS A REFERENCE.

Quality of the vendor's goods or services - 7 Points

- A.M. Best rating of A- = 3 points, A = 5, and A+ = 7

Extent to which the goods or services meet the district's needs - 30 Points

- Unique characteristics and qualifications
- Organizational information
- Specific services listed in pricing
- Implementation timetable and materials
- Who will be assigned to the District
- Safeguarding and securing confidential information
- Deviations and exceptions

Vendor's past relationship with the district - 2 Points

Negative past relationship scores -2 points, no past relationship scores 0 points, positive past relationship scores 2 points.

Other relevant factors specifically listed in this request for proposal - 15 points

Any available information known or available through the proposal response or otherwise to LISD may be used to score this criterion. (Deviations and Exceptions/1295 form complete and provided)

Total Points 106

6
1

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PRICING

Form 1295 - Certificate of Interested Parties**EVALUATION CRITERIA AREA**

Pursuant HB 1295, the addition of section 2252.908 of the Government Code, all awarded vendors must fill out electronically, with the [Texas Ethics Commission's online filing application](#).

The law states that a governmental entity or state may not enter into certain contracts with a business entity unless the business entity submits a disclosure of interested parties (Form 1295) to the governmental entity or state agency at the time the business entity submits the signed contract to the governmental entity or state agency. The Texas Ethics Commission has adopted rules requiring the business to file Form 1295 electronically with the Commission. This form must then be signed and attached in the Response Attachments, prior to any business transaction.

Please note the following:

Box 1: Please enter business entity filing form, city, state and country of the business entity's place of business.

Box 2: Please enter Lewisville ISD

Box 3: Please use LISD's solicitation (bid) number as the identification number being requested and the Contract name as description of goods or services.

After submitting the form on the [Texas Ethics Commission's online filing application](#), please print it and complete

Box 6. Provide a **signature** and attach with bid response.

A new form **MUST** be a completed upon each renewal.

Interested parties (1295 form) is not needed for publicly traded companies. Those parties are already public knowledge and can be obtained elsewhere.

Please acknowledge that you have read and understand that the District may not do business with your company without the submittal of this form.

☐ Yes, I acknowledge this requirement ☐ No, I am a publicly traded company

(Required: Check only one)

6
3**LISD Insurance Requirements Acknowledgment****LISD INSURANCE REQUIREMENTS - EVALUATION CRITERIA AREA**

Any individual or organization doing business with Lewisville Independent School District ("LISD" or the "District") is required to provide proof of various insurances, including workers' compensation insurance.

Vendor understands and agrees to abide by all terms, conditions, rules, and regulations provided in LISD's Contract title. In addition, the Vendor understands and agrees to abide by the procedures and policies of the District. Vendor holds the District harmless for injury to the Vendor and others and damage to the Vendor or district property. The Vendor acknowledges liability for injury or damage to the District and others, including district employees. Lewisville ISD's Purchase Order "General Terms and Conditions" are incorporated in this Contract by reference herein.

LISD TERMS AND CONDITIONS

Vendor acknowledges the District will NOT provide insurance coverage to the Vendor or its employees, subcontractors, agents, representatives, etc. Vendor represents to the District that all employees, subcontractors, agents, representatives, etc. of the Vendor will be covered by liability and workers' compensation insurance for the duration of the Vendor's Contract with LISD, that the coverages will be based on proper reporting to the insurance company(ies), and that all coverage agreements will be filed with the appropriate insurance carrier or state regulatory agency.

Insurance required for this contract:

*Commercial General Liability Policy

*Auto Liability Policy

*Workers' Compensation / Employers' Liability Policies

* Cyber / Data Breach Policy - Required for all vendors who have access to the LISD network, are providing software products, or have access to or collect any district or student personally identifiable information.

* Sexual Misconduct Policy- Required if district students and/or employees are present during contract performance (including virtually)

PLEASE save your Certificate of Insurance (Acord Form), in the response attachments tab, with your company name as the file name.

☐ Yes, I acknowledge

(Required: Check only one)

6
4**LISD Terms and Conditions****EVALUATION CRITERIA AREA**

LISD Terms and Conditions are provided in an attachment to the proposal. Please check if you agree or disagree to the terms and conditions of this proposal.

The District reserves the right to accept or REJECT any proposals based upon any deviations.

This is your electronic signature.

LISD TERMS AND CONDITIONS

☐ Agree ☐ Disagree

(Required: Check only one)

6
5**Indemnification****EVALUATION CRITERIA AREA**

IT IS TO BE UNDERSTOOD THAT THE BIDDER, IF AWARDED AN ORDER OR CONTRACT, AGREES TO PROTECT, DEFEND, AND HOLD HARMLESS THE LEWISVILLE INDEPENDENT SCHOOL DISTRICT AND ITS OFFICIALS AND EMPLOYEES FROM ANY SUITS OR DEMANDS FOR PAYMENT THAT MAY BE BROUGHT AGAINST LEWISVILLE INDEPENDENT SCHOOL DISTRICT AND ITS OFFICIALS AND EMPLOYEES FOR THE USE OF ANY PATENTED MATERIAL, PROCESS, ARTICLE, OR DEVICE THAT MAY ENTER INTO THE MANUFACTURE AND/OR CONSTRUCTION OR FROM A PART OF THE WORK COVERED BY EITHER ORDER OR CONTRACT AND, BIDDER FURTHER AGREES TO INDEMNIFY AND HOLD HARMLESS THE LEWISVILLE INDEPENDENT SCHOOL DISTRICT AND ITS OFFICIALS AND EMPLOYEES FROM SUITS OR ACTIONS OF EVERY NATURE AND DESCRIPTION BROUGHT AGAINST IT FOR, OR ON ACCOUNT OF ANY INJURIES OR DAMAGES RECEIVED OR SUSTAINED BY ANY PARTY OR PARTIES BY, OR FOR ANY OF THE ACTS OF THE BIDDER, HIS EMPLOYEES, SERVANTS OR AGENTS.

THIS CLAUSE SHALL SURVIVE TERMINATION OF THIS CONTRACT.

Educational entities are a Texas Political Subdivision and a local governmental entity; therefore, are prohibited from indemnifying third parties pursuant to the Texas Constitution (Article 3, Section 52) except as specifically provided by law or as ordered by a court of competent jurisdiction.

Does vendor agree?

☐ Yes ☐ No

(Required: Check only one)

6
6**Data Sharing Collection**

Does vendor collect data, have access to the LISD network, are providing software products, or have access to or collect any district or student personally identifiable information?

"Data" shall include, but is not limited to, the following: student data, metadata, user content, course content, materials, and any and all data and information that the District (or any authorized end user(s)) uploads or enters through its use of the product. "Data" specifically includes all personally identifiable information in education records, directory data, an other non-public information

If you answer yes to this question please complete the Data Sharing Agreement located in the attachments tab.

☐ Yes, please complete Data Sharing Agreement ☐ No, vendor does not collect data

(Required: Check only one)

6
7**References****EVALUATION CRITERIA AREA**

Please indicate three business references that have contracted with your school district/company to provide like products and/or services. Include the school district/company name, address, phone number, contact person, and email address. Preferable references are school districts in the Dallas Fort Worth area who have used your services within the last three years. Additional references may be required.

DO NOT INCLUDE LISD OR LISD EMPLOYEES AS A REFERENCE.

Note: Failure to supply complete reference information may be grounds for proposal disqualification. If a reference does not response it will result in points being deducted in the evaluation. Please verify that your references are willing to respond.

6
8**Reference 1 School District / Company Name**

Please provide the school district or company name.

(Required: Maximum 1000 characters allowed)

69	Reference 1 Contact Name Please provide contact name. <i>(Required: Maximum 1000 characters allowed)</i>
70	Reference 1 Phone Number Please provide the phone number. <div><div>() - </div><div></div></div> ext: <div></div> <i>(Required)</i>
71	Reference 1 Email Address Please provide the email address. <div></div> <i>(Required: Email address)</i>
72	Reference 2 School District / Company Name Please provide the school district or company name. <i>(Required: Maximum 1000 characters allowed)</i>
73	Reference 2 Contact Name Please provide contact name. <i>(Required: Maximum 1000 characters allowed)</i>
74	Reference 2 Phone Number Please provide the phone number. <div><div>() - </div><div></div></div> ext: <div></div> <i>(Required)</i>
75	Reference 2 Email Address Please provide the email address. <div></div> <i>(Required: Email address)</i>
76	Reference 3 School District / Company Name Please provide the school district or company name. <i>(Required: Maximum 1000 characters allowed)</i>

7
7**Reference 3 Contact Name**

Please provide contact name.

*(Required: Maximum 1000 characters allowed)*7
8**Reference 3 Phone Number**

Please provide the phone number.

ext: *(Required)*7
9**Reference 3 Email Address**

Please provide the email address.

*(Required: Email address)*8
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BILLING INFORMATION8
1**Order Reference Number**

If there is a reference number that Lewisville ISD must include on the Purchase Order to receive bid pricing, please state that number. If none, please enter N/A (not applicable).

*(Required: Maximum 1000 characters allowed)*8
2**Shipping and Handling**

Will there be charges for S&H/Freight on each order? If so, please state the charges. If no, please state "Not Applicable (N/A)".

*(Required: Maximum 1000 characters allowed)*8
3**Invoices**

All invoices must be submitted to LISD's Accounts Payable Department at invoices@lisd.net. If your company uses any other billing address, Lewisville ISD will not be responsible for late payments, service charges, etc. LISD's Purchase Order number must be referenced on the invoice.

8
4**Electronic Payment Solutions**

The Lewisville Independent School District has implemented an electronic payment solution allowing the District to pay invoices electronically. LISD currently pays all invoices 30 days after receipt of invoice via check through standard USPS. Should the District choose to pay you via an electronic payment solution, the payment time to the vendor can be drastically reduced upon receipt of invoice. This electronic payment process uses the backbone of the Visa/MasterCard network and the Vendor's payment gateway agreements. *Note* LISD will not be held responsible for fees, if any, associated by the Vendor's payment gateway provider for acceptance and use of this payment process.

***Please note: By responding yes, you may be contacted by our current vendor Commerce Bank for additional information. ***

Will your company accept use of this electronic payment process?

☐ Yes ☐ No

(Required: Check only one)

8
5**If Yes to Electronic Payment Solution**

Please provide the email or fax number where the payment can be processed.

(Optional: Maximum 1000 characters allowed)

8
6**If Yes to Electronic Payment Solution**

Please provide the contact name for payment processing

(Optional: Maximum 1000 characters allowed)

8
7**If Yes to Electronic Payment Solution**

Please provide the contact phone number for payment processing

(Optional: Maximum 1000 characters allowed)

8
8**If Yes to Electronic Payment Solution**

Please provide the name of the individual authorizing use of this payment form

(Optional: Maximum 1000 characters allowed)

8
9**If Yes to Electronic Payment Solution**

Please provide the phone number of the individual authorizing use of this payment form

(Optional: Maximum 1000 characters allowed)

9
0**If Yes to Electronic Payment Solution**

Please provide the title of the individual authorizing use of this payment form

(Optional: Maximum 1000 characters allowed)

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VENDOR INFORMATION9
2**Purchase Order Acceptance**

Will your company accept mailed, faxed, or emailed Purchase Orders issued by the Lewisville Independent School District?

☐ Yes ☐ No

(Required: Check only one)

9
3**Educational Purchasing Cooperative of North Texas (EPCNT)**

This request for proposal may be available for members of the Educational Purchasing Cooperative of North Texas to utilize. There are currently over seventy members. A list of current members may be found at the coop's website <http://www.new-epcnt.com/>.

9
4**EPCNT Interlocal Agreement**

Educational entities in the surrounding Lewisville Independent School District area have indicated an interest in participating under any resulting Contract. Should these Educational entities decide to participate in any resulting Contract, would you, (the Vendor) agree that all terms, conditions, specifications, and pricing contained herein would apply?

Educational entities utilizing interlocal agreements with the Lewisville Independent School District will be eligible, but not obligated, to purchase materials/services under the Contract(s) awarded as a result of this solicitation. All purchases by Educational entity other than Lewisville Independent School District will be billed directly to that Educational entity and paid by that Educational entity. Lewisville Independent School District will not be responsible for another Educational entity's debts. Each Educational entity will order its own material/service as needed.

☐ Agree ☐ Do not agree

(Required: Check only one)

9
5**Interlocal Agreement - CTPA**

Lewisville ISD is a member of the Central Texas Purchasing Alliance (CTPA), an alliance of over 200 school districts in the central Texas area who share in information, services and contractual opportunities. In support of this collaborative effort, a response of YES to CTPA indicates that the Respondent is interested in extending services to other CTPA member districts. However, there is no obligation on either party to participate unless both parties agree. Services would be provided under the same Contract pricing and purchasing terms established by this request. A negative reply by the Respondent will not adversely affect consideration of the Respondent's response. The information will be provided to CTPA member listing and in the event that this request and subsequent Contract may be used by the CTPA districts. If a member district chooses to utilize a Contract established by this request and subsequent Contract, Contracts will be awarded individually by those districts.

☐ Yes ☐ No

(Required: Check only one)

9
6**Purchasing Cooperative**

Has your company been awarded a purchasing cooperative Contract? If yes, please list the names of the Cooperatives and the Contract #(s) you have with each. If you have no cooperative Contract award, enter N/A (not applicable).

(Required: Maximum 4000 characters allowed)

9
7**Order Information - Company Name**

Please provide the Company Name to be used on Purchase Orders.

(Required: Maximum 1000 characters allowed)

9
8**Order Information - PO Box - Street Address**

Please provide the PO/Street Address where Purchase Orders are to be sent. Please indicated if the number is a suite or a PO box.

(Required: Maximum 1000 characters allowed)

9
9**Order Information - City**

Please provide the City where Purchase Orders are to be sent.

(Required: Maximum 1000 characters allowed)

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0**Order Information - State**

Please provide the State where Purchase Orders are to be sent.

(Required: Maximum 1000 characters allowed)

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1**Order Information - Zip Code**

Please provide the Zip Code where Purchase Orders are to be sent.

(Required: Maximum 1000 characters allowed)

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Order Information - Phone Number

Please provide the Phone Number where Purchase Orders are to be sent.

(____) ____ - ____ ext: _____

(Required)

1
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3

Order Information - Email Address

Please provide the Email Address where Purchase orders are to be sent. If none, please enter N/A (Not Applicable).

(Required: Email address)

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Remit Information - Company Name

Please provide the Company Name to be used for payments.

(Required: Maximum 1000 characters allowed)

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Remit Information - PO Box / Street Address

Please provide the PO/Street address where payments are to be sent.

(Required: Maximum 1000 characters allowed)

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Remit Information - City

Please provide the City where payments are to be sent.

(Required: Maximum 1000 characters allowed)

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Remit Information - State

Please provide the State where payments are to be sent.

(Required: Maximum 1000 characters allowed)

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Remit Information - Zip Code

Please provide the Zip Code where payments are to be sent.

(Required: Maximum 1000 characters allowed)

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Remit Information - Phone Number

Please provide the Phone Number where payments are to be sent.

(____) ____ - ____ ext: _____

(Required)

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Main Contact/Local Representative - Name

Please provide the Name of the Main Contact/Local Representative.

(Required: Maximum 1000 characters allowed)

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Main Contact/Local Representative - Title

Please provide the Title of the Main Contact/Local Representative.

(Required: Maximum 1000 characters allowed)

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Main Contact/Local Representative - Email

Please provide the Email Address for the Main Contact/Local Representative.

(Required: Email address)

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Main Contact/Local Representative - Phone

Please provide the Phone Number for the Main Contact/Local Representative.

() - ext:

(Required)

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Invoicing Contact - Name

Please provide the Name of the Invoicing Contact person.

(Required: Maximum 1000 characters allowed)

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Invoicing Contact - Title

Please provide the Title of the Invoicing Contact person.

(Required: Maximum 1000 characters allowed)

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Invoicing Contact - Email

Please provide the Email Address of the Invoicing Contact person.

(Required: Email address)

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7

Invoicing Contact - Phone

Please provide the Phone Number of the Invoicing Contact person.

() - ext:

(Required)

1 1 8	Online Catalog/Price List
	Is your Catalog/Price List available via the internet? If yes, please indicate the website address. If none, please enter N/A (not applicable).

(Required: Maximum 1000 characters allowed)	
1 1 9	Standard Delivery Time
	Please provide your ETA after receipt of the Purchase Order.

(Required: Maximum 1000 characters allowed)	
1 2 0	Re-Stocking Fee
	Does your company charge a re-stocking fee? If yes, please indicate the percentage (%) fee.

(Required: Maximum 1000 characters allowed)	

Bid Lines

1	PRICING
	EVALUATION CRITERIA AREA
<p>Item Notes: Pricing submitted for Excess Workers' Compensation Insurance will be evaluated as part of the overall proposal, including but not limited to proposed program structure, financial strength of carrier, claims handling approach, and overall cost effectiveness.</p>	
2	REQUIRED PRICING AND UNDERWRITING INFORMATION
	<p>Item Notes: A complete pricing submission must be included with the proposal and must be provided in a clear, readable electronic format (Excel preferred or searchable PDF). At a minimum, vendors must submit:</p> <ul style="list-style-type: none"> • Proposed premium and/or rate structure for Excess Workers' Compensation coverage • Rating methodology (including exposure basis such as payroll, class codes, or experience modification factors) • Description of stop-loss structure, attachment points, and any corridor or aggregate limits (if applicable) • Assumptions used in developing pricing • Carrier information and financial rating (A.M. Best or equivalent) <p>NOTE: INCOMPLETE PRICING OR UNDERWRITING INFORMATION MAY RESULT IN DISQUALIFICATION.</p>

3

- * Vendor shall respond to every line item by either entering a price for the products/services provided or by selecting "No Bid" for the products/services not provided.
- * Bid on any/all services your company can provide to the District and provide any rates / discounts available.\
- * No Bid - If you DO NOT provide the products/services, please select "No Bid" for that line item.
- * Save your progress as you go along. Line items may be listed on more than one page. Please save and then proceed to the next page when the current page is completed.

4

Premium for the Policy

(Response required)

Quantity: 1 UOM: EA Unit Price: Total:

Item Notes: Pricing should reflect the total annual cost of the proposed program including all fees, taxes, and administrative charges (if applicable)

Supplier Notes: _____

- ☐ No bid
- ☐ Additional notes
(Attach separate sheet)

Supplier Information

Company Name: _____

Contact Name: _____

Address: _____

Phone: _____

Fax: _____

Email: _____

Supplier Notes

By submitting your response, you certify that you are authorized to represent and bind your company.

Print Name _____

Signature _____