

**REQUEST FOR BID
INSURANCE COVERAGES**

Joplin Schools
P.O. Box 128
Joplin MO 64802-0128
Phone (417) 625-5200 Fax (417) 625-5210



REVISED April 23, 2024

INVITATION TO BID ON INSURANCE COVERAGE

Joplin Schools will accept bids for the following insurance coverages. The bid is organized as follows:

Section 1	Board of Education liability
Section 2	General public bodily injury and property damage liability
Section 3	Boiler and machinery
Section 4	Automobile liability and physical damage
Section 5	Workers' compensation
Section 6	Property and inland marine coverage on buildings and contents
Section 7	Employee crime coverage
Section 8	Cyber liability

General information (applicable to all coverages)

You are welcome to bid on any individual coverage; however, the District reserves the right to group individual coverages and award the bid as a unit. Your bid should be for an initial one-year award period (July 1, 2024 through June 30, 2025), with one-year renewal options at the discretion of Joplin Schools for four additional years (2025-2026 through 2028-2029).

Any detailed or individual application should wait until after the bid and award for completion or signature by the district.

A three-year claims history for the coverages specified above is available upon request from G.G. Mathis at 417-625-5200 ext. 2008 (ggmathis@joplinschools.org).

Sovereign immunity and sample policy language (applicable to all coverages)

All quotations for all policies must provide for sovereign immunity limits of \$3,370,137 occurrence (bodily injury & property damage) and \$505,520 per person (bodily injury), adjusted annually at January 1 to coincide with the sovereign immunity limit per revised Missouri statutes. Deductibles should not exceed \$10,000 for errors and omissions and \$10,000 for employment practice liability.

Recognizing that coverage forms for this specialized protection can vary, any departure from these specifications must be thoroughly explained. Any pertinent explanatory information may also be enclosed.

Joplin Schools requires that its policies of insurance providing liability coverage contain an endorsement which preserves sovereign immunity under RSMo. 537.600 et. seq.

The following sample language is taken from Missouri case law and statutes:

“This endorsement modifies insurance provided under the following:

(here insert the specific coverage, such as – COMMERCIAL GENERAL LIABILITY COVERAGE PART _____)

The purpose of this insurance does not include coverage for any liability or suit for damages which is barred by the doctrines of sovereign or governmental immunity by whatever name, as set forth RSMo. 537.600. et. seq.; this policy is not intended to abolish or to act as a waiver, nor is it a waiver of any defense available to the insured, its officers and employees, which might be otherwise available to the insured, its officers and employees, by statute or at common law.”

Bid submission

All proposals must show the name of the agent who will be servicing the account and the full name and address of the insurance company. Consideration will be given to the agent's availability to counsel with the school district and to service this account.

Bids, including the attached bid submission form (page 4) should be directed to Dr. Matt Harding, Assistant Superintendent, 825 S Pearl Ave/PO Box 128, Joplin MO 64802 (417-625-5200 ext. 2005). Bids must be sealed and labeled "Insurance Bid" on the outside and returned to the address listed above.

Along with a completed bid submission form, each bidder should submit a brief letter that describes its prior experience with school insurance, and the number of school districts (Missouri and other districts) represented by the bidder.

Electronic submission of bids

If you prefer to email your bid, we can accept bids in a secure email box. If you wish to submit your bid in this way, please email to:

sealedbid@joplinschools.org

by the deadline date and time specified on this bid form. Be sure that the subject line reads “INSURANCE BID.” The remaining documentation can be hand-delivered or sent via regular mail. *Emailing your bid is not a requirement.* Emailed bids will not be opened until the specified deadline.

If you choose to send the bid to the district's electronically secure location, you will receive a complimentary "thank you" auto reply message. If you do not receive this message please contact G.G. Mathis at 417-625-5200 ext. 2008.

Joplin Schools (the District) shall be held harmless for any failure to solicit bids from any potential bidders. The District is not responsible for lateness or non-delivery by the U.S. Postal Service or by email to the District. The time and date recorded by the District shall be the official time of receipt. Late bids will not be considered. Joplin Schools is not responsible for non-delivery or non-receipt of electronic bids.

Deadline for bid and initial invoices

All bid responses must be received by **2:00 p.m, Tuesday, May 21**. The Board of Education will determine winning bids on or before its next scheduled meeting on June 25. The approved bidders will be notified on May 22 and must issue policy binders on or before June 30, 2024, for coverage effective July 1, 2024.

Invoices for coverage effective July 1, 2024 must be received by June 27, 2024 to ensure payment on July 1.

A copy of the District's formal bid terms and standard conditions is enclosed and made a part of this request for bid. Joplin Schools, at its discretion, reserves the right to reject any or all bids for any reason and to waive information in any bid proposal, and requires insurance carriers to have at least an A-VII rating as shown in "Best's Rating Guide."

We appreciate your interest in participating in the bid process.

Sincerely,

Dr. Matt Harding
Assistant Superintendent for Operations

gm
Enclosures

BID SUBMISSION FORM

To submit a bid, complete the following worksheet, enclose errors and omissions insurance certificate, and return with your proposal(s).

Agency Name _____

Address _____

Telephone _____ Fax _____

Contact _____

Please submit certificate of errors and omissions coverage with this bid.

Coverage quoted	Insurance Carrier Name	Insurance Carrier Rating	Total Premium
Board of Education liability			
General public bodily injury and property damage liability			
Boiler and machinery			
Automobile liability and physical damage			
Workers' compensation			
Property and inland marine			
Employee crime coverage			
Cyber liability			

We have reviewed the minimum coverage specifications and except as expressly stated in this document, our proposals are in compliance with these specifications.

Note: to vary from minimum coverage specifications may disqualify the bid. Questions about requirements or specifications should be asked of the District prior to the bid deadline.

Signature _____ Date _____

Printed name: _____

Contact email: _____

Contact phone number: _____

SECTION 1
BOARD OF EDUCATION LIABILITY INSURANCE
(SCHOOL LEADERS ERRORS & OMISSIONS)

Current policy information

- Coverage through MOPERM
- Deductible: \$10,000

Coverage requirements

- Coverage to begin July 1, 2024
- Broad form coverage required for the school district, Board of Education and its members, plus all employees and volunteers.
- Coverage must be provided for defense, other costs, awards, settlements, and/or judgment. The district is presently insured on an occurrence basis and desires to continue as such.
- Coverage must provide for employment practices liability and employee benefits coverage.

Joplin Schools general information

Joplin Schools has continuously been in existence since March of 1873 and directly operates and administers public elementary and secondary schools, Pre-kindergarten through grade 12. The district employs approximately 1,200 employees on a full- or part-time basis. The current number of pupils as of October, 2023, was 7,459. The current average pupil/teacher ratio for all schools is 1:22.

Board of Education information

The school district is administered by seven school board members with two elected each year. The purpose of the Board of Education is to determine policy by which the school administrators supervise the activities of the School District. Any adult resident of the school district is eligible to serve in this non-paid position. Candidates must file individually and are elected by the public for terms of three years. Active board members in March, 2024 are:

Marda Schroeder

PO Box 2766
Joplin, MO 64803
Elected 4/23; term expires 4/26

Matthew Robertson

2706 S. Sergeant
Joplin, MO 64804
Elected 4/23; term expires 4/26

Veronica Gatz Scheurich

3301 Sunset Drive
Joplin, MO 64804
Elected 4/23; term expires 4/26

Rylee Hartwell

2815 New Hampshire Ave
Joplin, MO 64804
Elected 4/21; term expires 4/24

John Hird

11 Quail Ridge Drive
Joplin, MO 64804
Elected 4/21; term expires 4/24

David Weaver

1435 VanWinkle
Joplin, MO 64801
Elected 4/22; term expires 4/24

Donald L Greenlee II

4551 East 26th Street
Joplin, MO 64804
Elected 4/22; term expires 4/25

The Board of Education has written guidelines in addition to Missouri statutory law relating to procedure for suspension or non-renewal of employee contracts of teachers, supervisory personnel, nonprofessional employees, and students. Guidelines are written and provide for due process including hearings. Written guidelines relating to Missouri statutory laws are in place regarding conflict of interest in professional dealing between the School District and Board members or firms in which Board members have a significant interest. Joplin Schools is an affirmative action employer.

Joplin Schools has not been involved in any dispute concerning integration, segregation, or busing. No school activities have been disrupted in the past 34 years by either teacher or student strikes or any other actions. The school district is not presently involved nor has any knowledge of binding governmental or staff action against the school district, either board members or employees.

Financial information

Budget expenditures for the 2023-24 school year as of March, 2024 are \$115,028,742. The 2023-2024 budget anticipates a year-end balance of \$43.9 million.

The school district maintains a levy for operating the schools. The current levy is \$3.66 per \$100 of assessed valuation.

About 54 percent of the total revenue for the school district is derived through local taxation and about 27 percent comes through state aid. The balance of the budget is derived from grants from the federal government and non-revenue sources. Property values upon which the tax rate is based are determined by county assessors and not by any school employee.

**SECTION 2
GENERAL LIABILITY INSURANCE**

Current policy information

- Coverage through MOPERM
- Deductible: \$10,000 (\$1,000 for Employee Benefit Liability)

Coverage requirements

- Coverage to begin July 1, 2024
- Coverage on occurrence basis for claims on causes of action other than those established by Missouri law; and coverage for public officials and employees (limit \$2 million).
- Complete coverage for products and completed operations on all facets of the school operation (other than automotive training) must be included. The School District presently has no known contractual liability exposure. Policy should contain provisions for 60-day written notice of cancellation or termination.
- General Liability coverage form should provide Incidental Medical malpractice, products, coverage for acts or omissions of volunteers and employees, and IEP Hearing coverage (\$5000 deductible; \$50,000 limit).
- Garagekeepers legal liability coverage is also requested with the following limits:
\$500 deductible comprehensive
\$500 deductible collision
\$100,000 limit
- IEP hearing coverage (\$5000 deductible, \$50,000 limit)
- No punitive damage exclusion endorsement should be attached. Corporal punishment coverage is to be provided for all insureds.
- Named insureds shall include all members of the Board of Education or other governing authorities and all employees of the district while acting within the scope of their duties as such, including non-remunerated volunteers while performing services for the district.
- Although the Insured does operate Auto Technology plus Collision Repair instruction schools, the insured maintains a garage liability policy to cover these activities.
- **Information on the items below has been provided in detail with the understanding that any products and completed operations exposure that may arise from these incidental operations will be included in any policy prepared by the successful proposer.**

Joplin Schools general information

Certified teaching staff for School District 723
Includes administrators, counselors, librarians, guidance, therapists

Average Daily Attendance for School Year 2022-2023

Pre- Kindergarten	49.7933
Kindergarten	512.3573
Elementary schools	2870.3226
Middle schools	1570.0853
High school	1949.7064
Franklin Technology Center	0*

* Official attendance records for Franklin Tech secondary students are maintained in their home high schools. Franklin Tech has approximately 932 students from Joplin High School, College Heights, McAuley,

and neighboring school districts of Carl Junction, Sarcoxie, and Webb City. Franklin Tech also has approximately 80 post-secondary students enrolled across three (3) campus locations.

The School District employs 17 nurses who do routine first aid and are available for counseling in personal hygiene and other matters.

The school district has playgrounds that are open to the public after school hours at all of the elementary school locations including the Roi S Wood building and the Duenweg Education Center.

The School District's Food Service department provides lunch in all elementary, middle, and senior high schools during the regular school day. Each attendance center has a cafeteria and kitchen.

The School District has 16 elevators and lifts (one is a non-passenger dumbwaiter). A list by building is available upon request. Certificates of insurance are maintained in the files for all contractors doing work for the school system.

Facility use/outside organizations

No carnivals with rides, either school-sponsored or outside users.

Certificates of insurance are required with Joplin Schools as additional insured. Limits of liability required on certificate: \$500,000 property, \$2,000,000 personal injury.

Education programs K-12

Joplin Schools ten elementary schools (K-5), three middle schools (6-8), one high school (9-12), and one early childhood center. Joplin High School (JHS) has a Technology Education program with woodworking classes, CNC routers, laser engraving machines, VEX Robotics, and use of vinyl sign and poster equipment.

Additional programs also use welding simulators, robotics, CNC machining and CNC router equipment. The lab contains Programmable Logic Controller and AC/DC electrical trainers.

Franklin Technology Center's career and technical education programs include; Marketing, Business, Natural Resources (Landscaping/Greenhouse Management), Welding, Auto Technology, Collision Repair, Engineering/Drafting, Computer Networking, Health Science, Early Childhood, Carpentry/Heavy Equipment Operation, Heating Ventilation and Air Conditioning, TV, Broadcasting, & Audio Engineering, and Food Service training. Culinary Arts classes occasionally prepare food for special events. Health Science classes, with approximately 40 students enrolled, are conducted at various clinical sites. Early Childhood classes, with approximately 20 students enrolled, are conducted on-site, with various clinical sites; including the Joplin Early Childhood Center.

Adult post-secondary education programs

Located at the Franklin Tech/Joplin High School Campus:

FTC Adult Education, under the umbrella of Joplin Schools, operates several post-secondary (adult) vocational training programs, with both full-time and part-time students.

Located at Indiana Ave.:

FTC adult programs at the Indiana Avenue campus include three trade and technology programs: HVAC, Automotive Technology, and Welding. Each program accepts up to 20 students.

Located at Memorial Education Center:

The main campus at Memorial Education Center on Wall Avenue houses three (3) healthcare programs: Licensed Practical Nursing, Certified Nursing Assistant, and Phlebotomy Technician. The LPN program utilizes clinical experiences at area medical-based facilities, where students practice hands-on skills and cultivate professional experience to assist with future employment. CNA students complete the classroom portion of training and simulation experience on campus, and the remaining 100 hours are spent at area long-term care facilities.

Practical Nursing students spend approximately 304 clock hours in various hospital/clinical rotations. Students are required to rotate through numerous areas such as adult care, maternal child, mental health, IV therapy, and fundamental skills.

The LPN program accepts 40 students, and both CNA and Phlebotomy Technician programs accept up to 15 students per class.

Located at Missouri Southern State University:

The FTC – MSSU extension campus houses the Respiratory Care program and Dental Assistant program. RT student clinical experiences are spread over three semesters during the 2-year program, spending approximately 600 clock hours in rotation. The Dental Assistant program students spend approximately 204 clock hours in dental office rotations and externship sites.

The RT program accepts up to 26 students per cohort, and the Dental Assistant program accepts up to 20 students.

Athletics

The organized sports conducted in the Joplin school system are football, basketball, volleyball, baseball, track, golf, soccer, tennis, wrestling, softball, swimming, and cross country. Cheerleading and dance teams are also organized school activities. The School District does not employ physicians for any purpose, but local physicians are used regularly on a volunteer basis to give some athletic team physicals. It is presumed that these physicians maintain an adequate professional liability program. A certified athletic trainer (Joplin Schools employee) attends to the teams at most games. The local hospital provides additional trainers as needed.

Currently, the School District utilizes the services of the Freeman Hospital sports medicine centers. This center provides volunteers to act as trainers in working with all sports within the School District in providing first aid treatment, taping services, and basic advice to athletes and coaches on an as-needed basis.

Playground areas, football practice fields exist at Joplin High School, Junge Field, East Middle School, South Middle School, and North Middle School. Joplin High School also has a soccer field, softball field, and baseball field. The grounds of South Middle also have backstops to serve the baseball and softball diamonds.

Joplin High School golf matches are played at Schifferdecker Park (public course) and Twin Hills (private course). Schifferdecker and Twin Hills are rented for both the boys and girls golf seasons. The School District does not have a swimming pool but does sponsor girls' and boys' swim teams (approximately 25

girls, 25 boys, and 4 coaches). They use the pool located on the campus of Missouri Southern State College, which provides the pool on a rental basis. The School District pays for all expenses of the team.

Junge Field (owned by School District):

Number of admissions (22-23)	20,000
Receipts from admissions (22-23)	\$28,200
Receipts from concessions	0
Seating capacity	5,118
Number of times used during school year (excluding practices)	20
Purposes of use	football/ track
Receipts from rental to others (estimated)	\$0

Soccer Field (located at Joplin High School, owned by District):

Number of admissions (22-23)	3000
Receipts from admissions (22-23)	\$3,507
Receipts from concessions	0
Seating capacity	500
Number of times used during school year (excluding practices)	20
Purpose of use	Soccer
Receipts from rental to others	0

Baseball Field (located at Joplin High School, owned by District):

Number of admissions (22-23)	2,000
Receipts from admissions (22-23)	\$1,360
Receipts from concessions	0
Seating capacity	500
Number of times used during school year (excluding practices)	15
Purposes of use	baseball
Receipts from rental to others (estimated)	\$500

Softball Field (located at Joplin High School, owned by District):

Number of admissions (22-23)	500
Receipts from admissions (22-23)	\$1,143
Receipts from concessions	0
Seating capacity	300
Number of times used during school year (excluding practices)	15
Purposes of use	softball
Receipts from rental to others (estimated)	\$500

Tennis Courts (located at Joplin High School, owned by District):

Number of admissions (22-23)	300
Receipts from admissions (22-23)	\$0
Receipts from concessions	0

Seating capacity	75
Number of times used during school year (excluding practices)	20
Purposes of use	tennis
Receipts from rental to others (estimated)	\$0

Estimated number of participants in sports programs:

Football	240	Baseball	40
Basketball	190	Swimming	50
Track	450	Wrestling	120
Tennis	65	Cross country	120
Soccer	80	Softball	50
Volleyball	95	Golf	20

Trampolines in use: 0

Number of swimming pools: 0 (rent pool at Missouri Southern State University)

Stadiums/bleachers:

<u>Location</u>	<u>Seating</u>	<u>Construction</u>	<u>Use</u>
Junge Field	5,118	concrete/west alum. & steel/east	football/ track
JHS football field	1000	alum. & steel	football/track
JHS soccer field	500	alum. & steel	soccer
JHS baseball field	500	alum. & steel	baseball
JHS softball field	300	alum. & steel	softball

School locations and administrators

SCHOOL	PRINCIPAL/DIRECTOR	SECRETARY	EXT.	PHONE/FAX	ADDRESS
Cecil Floyd	Kristopher Garrett, Principal	Tina Herman	4002	625-5320	2201 W. 24th St.
	Vickie Gilbert, Asst. Principal	Barbara Peralta	4003	625-5324 fax	Joplin, MO 64804
Dover Hill	Jason Weaver, Principal	Erin Bartmess	4600	625-5325	1100 N. Main St.
	Shelby Frakes, Asst. Principal	Gena Brown	4606	625-5329 fax	Joplin, MO 64801
Eastmorland	Heather Surbrugg, Principal	Dianne Ellman	4200	625-5340 625-5354 fax	1131 Highview Ave. Joplin, MO 64801
Iriving	Jordan Adkins, Principal	Stefanie Allen	3123	625-5350	2901 S. McClelland Blvd.
	Tylan Harris, Asst. Principal	Darla Lee	3124	625-5354 fax	Joplin, MO 64804
Jefferson	Kern Sorrell, Principal	Lupi Lilly	4350	625-5355 625-5216 fax	130 S. McKinley Ave. Joplin, MO 64801
Kelsey Norman	Julie Munn, Principal	Julie Dameron	4150	625-5360 625-5364 fax	1323 E. 28th St. Joplin, MO 64804
McKinley	Jason Riddle, Principal	Pam Devins	4450	625-5365 625-5369 fax	810 S. Forest Ave. Joplin MO 64801
Royal Heights	Bre Faircloth, Principal	Sammie Casey	4500	625-5370 625-5374 fax	2100 Rolla St. Joplin, MO 64801
Soaring Heights	Katy Booher, Principal	Misty Hirshey	4100	625-5330	4004 E. 20th St.
	Josh Thompson, Asst. Principal	Bob Harrington	4106	625-5334 fax	Joplin, MO 64801
Stapleton	Kasey Pfler, Principal	Natasha Jefferies	4550	625-5375	101 E. 41st St.
	Randi Barkley, Dean of Students	Elizabeth Vaughn	4555	625-5379 fax	Joplin, MO 64804
EMS	Jason Cravens, Principal	Caroline Underwood	3401	625-5280	4594 E. 20th St.
	Paul Gipson, Asst. Principal			625-5284 fax	Joplin, MO 64801
NMS	Tracy Newell, Principal	Susan Elledge	3501	625-5270	102 Gray St.
	Jason Vieselmeier, Asst. Principal	Shannon Caylor	3500	625-5273 fax	Joplin, MO 64801
SMS	Jacob Williams, Principal	Alison Russell	3304	625-5250	900 E. 50th St.
	Katie Hall, Asst. Principal	Ashleigh Hartman	3307	625-5256 fax	Joplin, MO 64804
JHS	Randy Oliver, Principal	Teresa Veith	3002	625-5230	2104 S. Indiana Ave
	Ed Raschen, Student Success Coordinator	Kerry Cravens	3027	625-5238b fax	Joplin, MO 64804
	Holly Yust, Asst. Principal- 12th	Kassie Schwarting	3018	Ext. 3027	
	Mark LaTurner, Asst. Principal- 11th	Kassie Schwarting		Ext. 3018	
	John Seidel, Asst. Principal- 10th	Kerry Cravens		Ext. 3018	
	Dustin Dixon, Asst. Principal- 9th	Kerry Cravens		Ext. 3027	
FTC	Kaci Dorton, Director	Marian Gibby	3202	625-5260	2220 Indiana Ave.
		LeAnna Cummins	3200	625-5266 fax	Joplin, MO 64804
FTC- Adult	Penny Williams, Director	Nikki Medley	2060	680-0004 Ext. 2064 680-0005 fax	810 S. Wall Joplin, MO 64801
Beacon- Duenweg	Chawn Howard	Jennifer Tyler	2204	625-5215 Ext. 2204	202 Malloy Circle Duenweg, MO 64841
Roi S. Wood	Shelly Tarter	Susan Wear	2236	680-5123 Ext. 2236	1717 E. 15th St.
	Dave Armstrong			625-5219 fax	Joplin, MO 64801
JEC	Emily Pearce, Director	Robyn Hirshey	4250	625-5275 625-5336 fax	2825 S. McClelland Blvd. Joplin, MO 64804
PAT	Kerri Clouse, Director		4261	208-2069 Ext. 4261 625-5336 fax	2825 S. McClelland Blvd. Joplin, MO 64804

**SECTION 3
BOILER AND MACHINERY INSURANCE**

Current policy information

- Coverage through Alliant (APIP); included with property policy
- Deductible: \$25,000

Coverage requirements:

1. Coverage effective July 1, 2024
2. Total limit per breakdown: \$100,000,000
3. Full coverage if available
Current Deductible: \$25,000
4. Type coverage: Blanket Broad Form/Replacement cost
(Indicate on bid if replacement cost applies to certain objects only)
5. Losses: None past three years
6. All recommendations of present carrier have been completed.
7. Work planned for summer of 2024: Routine maintenance on all items.

If a prospective bidder wishes to inspect any or all locations, arrangements should be made with Dave Pettit, Director of Bldgs. and Grounds (call 417-625-5200, ext. 2101).

Joplin Schools, at its discretion, reserves the right to reject any or all bids for any reason and to waive information in any bid proposal, and requires insurance carriers to have at least an A-VII rating as shown in "Best's Rating Guide."

**Joplin Schools
List of Active Boilers March 2024**

LOCATION	JURISDICTION NO.	MANUFACTURER	YEAR BUILT
JOPLIN HIGH SCHOOL	MO107891	HORNET	2013
JOPLIN HIGH SCHOOL	MO107892	HORNET	2013
JOPLIN HIGH SCHOOL	MO107893	HORNET	2013
JOPLIN HIGH SCHOOL	MO107894	HORNET	2013
JOPLIN HIGH SCHOOL	MO107874	AERCO	2013
JOPLIN HIGH SCHOOL	MO107875	AERCO	2013
JOPLIN HIGH SCHOOL	MO107876	AERCO	2013
JOPLIN HIGH SCHOOL	MO107877	AERCO	2013
BGT	MO075321	MANCHESTER TANK	2004
KELSEY NORMAN	MO025160	BRADFORD WHITE	1994
BUS GARAGE	MO085913	STEEL FAB	2008
BUS GARAGE	MO085926	NORITZ CORPORATION	2007
BUS GARAGE	MO085927	NORITZ CORPORATION	2007
MEC / ADMIN	MO055386	RAY PAK	2001
MEC / ADMIN	MO066398	RAY PAK	2001
SOUTH MIDDLE	MO091303	GIANNO	2008
SOUTH MIDDLE	MO091304	GIANNO	2008
SOUTH MIDDLE	MO091305	GIANNO	2008
SOUTH MIDDLE	MO091306	GIANNO	2008

SECTION 4 AUTOMOBILE LIABILITY INSURANCE

Current policy information

- Coverage through MOPERM
- Deductible: \$1,000 comprehensive/collision; \$10,000 auto liability

Coverage requirements

- Coverage to begin July 1, 2024
- Limits:
 - \$5,000 medical payments - passenger cars and buses only
 - \$1,000 deductible comprehensive - all vehicles*
 - \$1,000 deductible collision - all vehicles as listed*
 - \$1,000,000 uninsured motorists and under-insured (optional) motorists
- * Prior to July 1, insured reserves the right to remove older vehicles from comprehensive or collision coverages.
- Comprehensive automobile liability form including use of any auto and automatic fleet physical damage coverage is required. No time limit for reporting schedule changes to be required; however, the district will endeavor to report all changes within 30 days.
- Policy schedule, or separate exhibit, must contain a breakdown of premium per vehicle. Must include Symbol 1 on liability and Symbol 2 on physical damage.
- Definition of insured must include all school officials, Board members, nurses, doctors, teachers, coaches, volunteers and all persons permitted to drive vehicles.
- Operation of any facility, or any automobile in connection instruction in Auto Mechanics, Body Repair, or service shall be covered, including road testing.
- Required Garage Liability Endorsement applying to operation of School Auto Repair training facility be attached to provide products, completed operations, and road testing of vehicles. Garagekeepers liability for comprehensive coverage with \$500 deductible for theft and V & MM and \$500 deductible for collision should apply with \$100,000 limit. No specific location, although autos are normally in custody only at Franklin Technology Center, a masonry, non-combustible building at 2220 Indiana Ave. in Joplin.
- Liability coverage must be provided for use of any miscellaneous or utility trailer.

General information

1. Non-owned and hired autos: approximately 1099 employees
2. Road testing: Estimated 24 at Franklin Technical Center
3. Bus repair and testing endorsement (during suspension period) at bus garage.
4. Products and completed operations: Average number of cars worked on each week at Franklin Technical Center: 5

A list of current authorized district drivers is available upon request. Contact G.G. Mathis (gmathis@joplinschools.org) for a copy.

**SECTION 5
WORKERS COMPENSATION INSURANCE**

Current policy information

- Current coverage through RAS/First Dakota Indemnity
- Current limits: \$1,000,000 each accident; \$1,000,000 bodily injury by disease policy limit; \$1,000,000 bodily injury by disease each employee

Classification	Code	2023 Audited Payrolls	Est. Payroll 7-1-24 through 7-2-25
Drivers	7380	\$2,167,283	\$2,156,353
School-Professional Employees and Clerical	8868	\$48,019,141	\$48,753,272
School-All Other	9101	\$5,800,688	\$5,881,483

Wages have remained steady in recent years.

Prior Year Premiums

2023-2024	\$364,846 (prior to final audit)
2022-2023	\$417,077
2021-2022	\$397,078

Coverage requirements

- Coverage to begin July 1, 2024
- All employment is within the State of Missouri and the limit for employers liability, coverage "B", should not be less than \$1,000,000/\$1,000,000/\$1,000,000. Policy must also contain other states endorsement and voluntary compensation endorsement.
- Experience modification of .86 (effective 7/1/23) should be used for premium calculation purposes.
- Include coverage for volunteers. Best estimate is 200 volunteers who donate 3,000 volunteer hours per year assisting school administrators and teachers in such areas as libraries, parent-teacher organizations, room mothers, concession stands, etc.
- The District asks each bidder to provide information about its service plan to determine if it will fit the District's program. Nursing case management made available with the policy should be described. The District prefers to utilize a local attorney firm with extensive expertise in workers compensation issues. Please respond to this specifically.

General information

The School District currently uses a Risk Management Program. The key elements of the program include:

- Written safety program (OSHA compliant) available in each building
- Accident report/investigation program
- Designated physician program
- Medical bill cost containment program
- Case management nurse program (as made available by carrier)
- Return to work program

SECTION 6 PROPERTY/INLAND MARINE INSURANCE

Current policy information

- Coverage through Alliant (APIP)
- Deductible (all risk): \$250,000 per occurrence

Coverage requirements—property

- Coverage to begin July 1, 2024
- Minimum coverage acceptable will be on a "special or comprehensive" basis and must be equal in every regard to these specifications.
- Quotation must include "agreed amount endorsement." One amount blanket on all buildings and contents is required. Old Bus Garage and Refunction Junction building are covered for actual cash value. Remaining buildings and all contents are covered on replacement cost basis.
- Quotations are desired for a \$5,000 deductible (property), with options for a \$10,000 occurrence deductible, and \$1,000 (Inland Marine) where only one deductible applies to multiple losses arising out of one occurrence. Current wind/hail deductible: \$250,000.
- Cancellation provisions must be amended to provide, that except for failure to pay premium, insurance company may not cancel any portion of coverage without 60 days prior written notice.
- Any dividend proposals should be carefully explained on the attached dividend information sheet.
- The district may desire to purchase blanket earthquake and flood coverage with an occurrence deductible. This coverage is not mandatory to furnish the special or comprehensive property quotation, but could be a factor in selecting the property insurance carrier. We will consider limits of earthquake and flood coverage at levels lower than the overall property limit, but no less than \$10,000,000 aggregate for earthquake coverage and \$5,000,000 for flood coverage. This procedure would be preferred to separate amounts and percentage deductibles per location. If other blanket amount or flat deductible provisions are used, please set forth the coinsurance requirements and deductible provisions in detail.
- Attached schedule represents an estimated 100 percent replacement cost on specified buildings and 100 percent replacement cost on all contents items.

Walkthroughs upon request

If you desire a walk-through of district buildings and facilities, contact Dave Pettit, Director of Buildings and Grounds, at (417) 625-5300. Joplin Schools may opt to set one specific date for walk-throughs for interested parties.

Coverage requirements—inland marine

- Inland Marine schedule for computer equipment, office machines, audio/visual equipment, and telephone equipment, mowers, tractors and related equipment may be included by endorsement with separate deductible, or may be written under a separate policy.
- Coverage is to be provided on a direct physical loss (all risk) form and must stipulate whether earthquake and/or flood coverages are included. Actual Cash Value coverage with \$1,000 occurrence deductible is requested. A \$1,000 occurrence deductible will be considered and should be quoted as an option.
- Form must have \$50,000 automatic coverage for similar equipment on trial, demonstration, or for newly acquired items.
- Coverage must be provided on insured's premises, while in transit, and at non-owned locations. This equipment may move from one building to another or off premises for special purposes. A limited number of computers may be housed in the homes of teaching staff during the summer months, while projectors and video cameras are mobile by nature.

- A separate policy covering these items is acceptable or coverage may be provided by endorsement to the building and contents blanket property coverage. These values can be included as items of the buildings and contents schedule.

**Summary of Covered Items–Inland Marine
Spring 2024**

Microcomputer hardware, mainframe computer hardware	
Hardware	\$3,664,215
Audio visual equipment	3,745,037
Software	<u>1,000,000</u>
	\$8,409,252
 Musical instruments and uniforms	 \$930,372
 Frozen locker coverage of goods the property of insured, coverage of meat, food, vegetables, fruits, and other edible merchandise while contained in any cold storage facility	 \$274,815
 Property of insured in transit (covers sports equipment, music equipment, and other school property temporarily away from school premises), and newly acquired items not yet reported	 \$59,260
 Mowing/maintenance equipment	 \$517,330

A schedule of these coverages is on file with Joplin Schools.

FACILITY	CONST DATES	SITE IN ACRES	BUS LOADING ON STREET	BUS LOADING OFF STREET
CECIL FLOYD	1985, 2006, 2014	13.60		X
DOVER HILL	2022	21.07		X
DUENWEG	1959, 1962, 1994, 2014	5.70		X
EARLY CHILDHOOD CENTER	2018, 2019	3.95		X
EASTMORLAND	1954, 1985, 2008, 2014	7.10		X
IRVING	2014	13.50		X
JEFFERSON	1954, 1964, 1985, 2014	2.60		X
KELSEY NORMAN	1965, 1985, 2014, 2020	4.10		X
MCKINLEY	1955, 1985, 2008, 2014	4.40	X	
ROYAL HEIGHTS	1917, 1954, 1965, 1990, 2014	2.70		X
STAPLETON	1964, 1985, 2008, 2014	9.90		X
WEST CENTRAL	1928, 1930, 2014	4.30	X	
JOPLIN HIGH SCHOOL / FTC	2014	66.00		X
CONCESSION BLDG (2)	2014			
CONCESSION BLDG (2)	2014			
TRACK STORAGE BUILDING	2024			
EAST MIDDLE/ SOARING H.	2014	34.80		X
MEMORIAL ED CENTER: ADMINISTRATION, GIFTED PROGRAM, ADULT FTC	1917, 1930, 1968, 1989, 2018	6.10	X	

FACILITY	CONST DATES	SITE IN ACRES	BUS LOADING ON STREET	BUS LOADING OFF STREET
NORTH MIDDLE	1931, 2009	9.60		X
SOUTH MIDDLE	2009	60.00		X
SMS CONCESSION BLDG	2009			
ROI S WOOD BLDG	1966	5.40		X
BGT/WAREHOUSE	1965	4.71		
OLD BUS GARAGE	1947	0.80		
JOHN HOKE FACILITY: FLEET MAINTENANCE BUILDING	2008	2.00		
JUNGE STADIUM	1934, 2014, 2021	12.27		X
JUNGE CONCESSION BLDG	2003			
JUNGE SAFE ROOM	2014			
JUNGE STORAGE BLDG	2007			
JUNGE TRACK STORAGE	2024			
FOOD SVC BLDG	1968, 1969, 1979	0.80		
REFUNCTION JCT	UNKNOWN			
TOTAL		295.40		

See Statement of Values with current square footages listed on policy. Per current carrier APIP, there is a 5 % increase on all Buildings and Contents.

Insured Name: Joplin School District
 Policy Effective: 07/01/2024 to 07/01/2025

Deductible:	\$250,000
Wind/Hail D	\$250,000
BI/EE:	\$2,000,000
Ordinance o	\$2,000,000
EDP: Inc.	
Coinsurance:	100%

Loc	Bldg	Location Address	City	State	Zip Code	% Occupied	Occupancy	Sq Ft	2023/2024 Building	2024/2025 Building	2023/2024 Contents	2024/2025 Contents	2023/2024 Total	2024/2025 Total
									Total Value	Total Value w/ 5% Increase	Total Value	Total Value w/ 5% Increase	TIV	TIV w/ 5% INCREASE
									\$430,667,964	\$438,825,530	\$62,999,534	\$65,703,182	\$495,667,499	\$506,528,712
1	1	2201 W. 24th St	Joplin	MO	64804	100%	Cecil Floyd Elementary/SR	72,598	\$16,991,562	\$16,991,562	\$1,374,951	\$1,443,699	\$18,366,513	\$18,436,261
2	2	610 W. F St.	Joplin	MO	64801	100%	Columbia Mobile	1,905	\$88,511	\$92,937	\$13,076	\$13,730	\$101,587	\$106,666
2	3	610 W. F St.	Joplin	MO	64801	100%	Columbia Mobile	1,905	\$88,511	\$92,937	\$13,076	\$13,730	\$101,587	\$106,666
3	1	130 S. McKinley Ave.	Joplin	MO	64801	100%	Jefferson Elementary/SR	34,164	\$8,514,694	\$8,514,694	\$519,530	\$545,507	\$9,034,224	\$9,060,201
4	1	1323 E. 28th St.	Joplin	MO	64804	100%	Kelsey Norman Elementary/SR+ 2021 Addition (8,484 sq ft added)	38,564	\$9,582,768	\$9,582,768	\$886,118	\$930,424	\$10,468,886	\$10,513,192
4	2	1323 E. 28th St.	Joplin	MO	64804	100%	Kelsey Norman Mobile	1,904	\$88,511	\$92,937	\$13,075	\$13,729	\$101,586	\$106,665
5	1	610 S. Forest Ave.	Joplin	MO	64801	100%	McKinley Elementary & Gym	54,094	\$13,072,897	\$13,072,897	\$0	\$0	\$13,072,897	\$13,072,897
6	1	2100 Rolla St.	Joplin	MO	64801	100%	Royal Heights Elem/SR	39,071	\$9,681,794	\$9,681,794	\$634,482	\$666,206	\$10,316,276	\$10,348,000
7	1	101 E. 41st St.	Joplin	MO	64801	100%	Stapleton Elem/Deaf, Blind School/SR	53,201	\$13,345,471	\$13,345,471	\$1,325,370	\$1,391,639	\$14,670,841	\$14,737,110
9	1	1001 W. 7th St.	Joplin	MO	64801	100%	West Central Elementary/SR	33,350	\$3,709,848	\$6,768,383	\$571,831	\$600,423	\$4,281,679	\$7,368,806
10	1	102 Gray Ave.	Joplin	MO	64801	100%	North Middle	175,143	\$36,554,096	\$36,554,096	\$3,261,179	\$3,424,238	\$39,815,275	\$39,978,334
11	1	825 S. Pearl Avenue (pr.310 W	Joplin	MO	64801	100%	Memorial Education Center/Admin	133,379	\$29,282,026	\$29,282,026	\$3,143,907	\$3,301,102	\$32,425,933	\$32,583,128
12	1	1717 E. 15th St.	Joplin	MO	64804	100%	Roi S. Woods	16,300	\$2,338,428	\$3,905,154	\$345,191	\$362,451	\$2,683,619	\$4,267,605
13	1	1301 S. Picher Ave.	Joplin	MO	64804	100%	Workshop Warehouse BGT	15,164	\$2,443,318	\$2,568,484	\$196,654	\$206,487	\$2,639,972	\$2,771,971
14	1	1301 S. Pearl Ave.	Joplin	MO	64804	100%	Old Bus Garage ACV	17,000	\$354,042	\$371,744	\$226,012	\$237,313	\$580,054	\$609,057
15	1	1208 W. 13th St.	Joplin	MO	64804	100%	Refunction Jct. ACV	960	\$88,511	\$92,937	\$11,623	\$12,204	\$100,135	\$105,141
16	1	1420 Broadway St.	Joplin	MO	64801	100%	Food Service Warehouse/Fencing/SR	13,580	\$1,300,534	\$1,365,561	\$348,677	\$366,111	\$1,649,211	\$1,731,672
17	1	800 Junge Boulevard	Joplin	MO	64804	100%	Junge Field-Stadium/Bleachers/Astro Turf/Press Box/Lights/Poles/Track/Fencing/Wiring	8,000	\$2,360,282	\$2,478,296	\$0	\$0	\$2,360,282	\$2,478,296
17	2	800 Junge Boulevard	Joplin	MO	64804	100%	JF Conc/Rest/Stor/Safe Room	9,540	\$2,065,246	\$2,168,508	\$290,564	\$305,092	\$2,355,810	\$2,473,601
17	3	800 Junge Boulevard	Joplin	MO	64804	100%	Junge Field- New TAMKO Tron Video Board		\$338,356	\$355,274	\$0	\$0	\$338,356	\$355,274
18	1	1432 S. Picher Ave.	Joplin	MO	64804	100%	New Bus Garage/Hoke Facility	16,500	\$2,053,758	\$2,597,265	\$288,936	\$303,383	\$2,342,694	\$2,900,648
19	1	900 E. 50th St.	Joplin	MO	64804	100%	South Middle School- Concession/Restrooms/Storage Building	139,029	\$29,775,841	\$29,775,841	\$2,734,792	\$2,871,532	\$32,510,633	\$32,647,373
20	1	123 S. Main St.	Joplin	MO	64801	100%	Adult Ed Program/Shopping Center		\$0	\$0	\$116,226	\$122,037	\$116,226	\$122,037
21	1	4594 and 5994 E. 20th St.	Joplin	MO	64801	100%	Soaring Heights Elem/East Middle School/Fencing/SR	227,064	\$48,012,683	\$48,012,683	\$8,246,219	\$8,658,530	\$56,258,902	\$56,671,213
22	1	2901 McClelland Blvd.	Joplin	MO	64804	100%	Irving Elementary/SR	88,391	\$21,237,706	\$21,237,706	\$3,138,096	\$3,295,001	\$24,375,802	\$24,532,707
23	1	202 Malloy Circle	Duenweg	MO	64841	100%	Duenweg Elementary/SR	28,200	\$4,699,680	\$5,723,190	\$17,433	\$18,305	\$4,717,113	\$5,741,495
24	1	1131 S. Highview Ave.	Joplin	MO	64801	100%	Eastmoreland Elementary/SR	50,969	\$12,130,112	\$12,130,112	\$900,749	\$945,786	\$13,030,861	\$13,075,898
25	1	2104 and 2220 Indiana Ave.	Joplin	MO	64804	100%	High School/Franklin Tech	486,201	\$121,234,219	\$121,234,219	\$21,617,993	\$22,698,893	\$142,852,212	\$143,933,112
25	2	2104 Indiana Ave.	Joplin	MO	64804	100%	Football Field/Track/Fencing/Astro Turf		\$2,950,353	\$3,097,871	\$0	\$0	\$2,950,353	\$3,097,871
25	3	2104 Indiana Ave.	Joplin	MO	64804	100%	Tennis Courts/Baseball Field/Fencing		\$1,180,140	\$1,239,147	\$0	\$0	\$1,180,140	\$1,239,147
25	4	2104 Indiana Ave.	Joplin	MO	64804	100%	Soccer Field/Fencing		\$590,071	\$619,575	\$0	\$0	\$590,071	\$619,575
25	5	2104 Indiana Ave.	Joplin	MO	64804	100%	Restroom & Concessions		\$295,036	\$309,788	\$46,489	\$48,813	\$341,525	\$358,601
25	6	2104 Indiana Ave.	Joplin	MO	64804	100%	Poles, Wiring, Lighting, Fencing	2,600	\$1,180,140	\$1,239,147	\$0	\$0	\$1,180,140	\$1,239,147
25	7	2104 Indiana Ave.	Joplin	MO	64804	100%	Greenhouse		\$354,042	\$371,744	\$58,112	\$61,018	\$412,154	\$432,762
26	1	2825 S. McClelland	Joplin	MO	64804	100%	NEW Early Childhood Center	37,744	\$9,144,616	\$9,144,616	\$174,339	\$183,056	\$9,318,955	\$9,327,672
27	1	1100 N Main Street	Joplin	MO	64801	100%	NEW Dover Hill Elementary-Completed 12/2022	70,000	\$23,540,161	\$24,717,169	\$2,354,016	\$2,471,717	\$25,894,177	\$27,188,886
		VARIOUS LOCATIONS	Joplin	MO	64804	100%	EDP/ AUDIO VISUAL EQUIPMENT		\$0	\$0	\$8,409,252	\$8,409,252	\$8,409,252	\$8,409,252
		VARIOUS LOCATIONS	Joplin	MO	64804	100%	MUSICAL INSTRUMENTS & UNIFORMS		\$0	\$0	\$886,069	\$930,372	\$886,069	\$930,372
		VARIOUS LOCATIONS	Joplin	MO	64804	100%	FROZEN FOODS		\$0	\$0	\$261,729	\$274,815	\$261,729	\$274,815
		VARIOUS LOCATIONS	Joplin	MO	64804	100%	PROPERTY OF INSURED IN TRANSIT		\$0	\$0	\$56,438	\$59,260	\$56,438	\$59,260

		VARIOUS LOCATIONS	Joplin	MO	64804	100%	C.E. Mowing/Maint. Equipment/Mobile Equipment		\$0	\$0	\$517,330	\$517,330	\$517,330	\$517,330
							Business Income \$2,000,000					\$2,000,000	\$2,000,000	\$2,000,000
							TOTAL	1,866,520	\$430,667,964	\$438,825,530	\$62,999,534	\$65,703,182	\$495,667,499	\$506,528,712

SECTION 7
EMPLOYEE CRIME COVERAGE
(EMPLOYEE BLANKET BOND)

Current policy information

- Coverage through Travelers (runs 7/18/23 through 7/18/24)
- Deductible (retention): \$10,000 single loss

Coverage requirements

- Coverage to begin July 1, 2024
- Includes employee fidelity, forgery/alteration, on premises and in transit, computer crime, funds transfer fraud.

SECTION 8 CYBER LIABILITY INSURANCE

Current policy information

- Coverage through Cowbell Cyber Insurance
- Deductible: \$75,000; \$500,000 limit

Coverage requirements

- Coverage to begin July 1, 2024
- Should include these elements:

Liability costs
PCI costs
Regulatory costs
First party expense—breach fund
Data restoration costs
Extortion costs
Business impersonation costs
Reputational harm expense
Business interruption loss
Contingent business interruption loss
System failure
Contingent system failure
Cyber crime loss
Bricking costs
Criminal reward costs up to \$100,000

Customer notification
Recovering personal identities

Policy DJF-1: PURCHASING

Original Adopted Date: 05/26/2011 | Last Revised Date: 04/18/2023 | Last Reviewed Date: 04/28/2023

The purpose of this policy and any related administrative procedures is to ensure that all purchases of supplies, equipment and services are made in compliance with state and federal law and good business practices. The board recognizes the importance of a sound fiscal management program and expects district staff to maximize the resources available for the district's educational program and to be good stewards of public funds by exercising fair, competitive purchasing practices. The district will respect its financial obligations and will also require that providers meet their obligations to provide quality products and services in a timely manner to the district. All purchasing will be conducted in a manner that provides full and open competition consistent with the standards of state and federal law.

All funds deposited with the district, regardless of source, are considered district funds and are subject to this policy. No contract will be entered into or bill paid without the proper documentation and without an affirmative vote from a majority of the whole board. No unbudgeted purchase will be made without prior board approval unless this policy's emergency provisions are applicable.

The board encourages district staff to purchase products manufactured, assembled or produced in the United States.

Purchasing Supervision

The chief financial officer will serve as the district's purchasing officer or will designate a purchasing officer. The purchasing officer will supervise district purchases of products and services and may authorize purchases on behalf of the district that comply with the board-adopted budget and this policy.

The superintendent, in consultation with the purchasing officer, shall develop procedures to implement this policy in a manner that will meet the district's needs while protecting the district's resources. These procedures will comply with all applicable laws and will centralize and provide oversight of all purchasing decisions.

Competitive Purchasing

District staff will research all purchases and compare prices prior to making decisions regarding the expenditure of district funds unless a purchase is covered by an exception pursuant to this policy. Employees are expected to contact multiple providers before making a decision regarding purchases under \$2,000. Purchases ranging from \$2,001 to \$4,999 shall be made on the basis of at least three written quotes in accordance with procedure, with documentation provided to finance with the PO (quote form and actual written quotes). Purchases over \$50,000 will be made after receiving sealed bids through the purchasing officer or designee, in accordance with procedure, and submitted for board action. Appropriate informal purchasing methods may be used for purchases under \$50,000. Formal purchasing methods are required for purchases that may exceed \$50,000.

The district will select the lowest or best bid. The district reserves the right to waive minor technical defects in a bid, reject any and all bids, reject any part of a bid, advertise for new bids, or make the purchase on the open market if the product or service can be obtained at a better price.

The district will award contracts only to responsible contractors possessing the ability to perform successfully under the terms and conditions detailed by the district. Among other factors detailed in the bid specifications, consideration will be given to such matters as contractor integrity, compliance with public policy, record of past performance, and financial and technical resources.

Unless bids are for a one-time, specific purpose, bids will apply to purchases for up to the next 12-month period. Bid threshold amounts should reflect the known or estimated costs anticipated over the 12-month period. Bid periods that are over 12 months require approval by the superintendent or purchasing officer.

When the purchasing officer determines that it is in the best interest of the district, products or services may be purchased by competitive negotiations or proposals rather than competitive bids. Likewise, the superintendent, in consultation with the purchasing officer, is directed to create procedures that allow the district to benefit from cooperative purchasing and address unusual situations such as purchasing when there is a single feasible source for the purchase, or the district has contracted for procurement services. The superintendent is also directed to create a process whereby authorized providers are selected for frequent purchases, while still monitoring the competitiveness of these providers. If the purchase is from a single-source provider, bid documentation must include an explanation of why a single-source vendor must be used and must be submitted to the superintendent or purchasing officer for review and approval.

In addition to the requirements of this policy and the accompanying procedure, the provisions of policy DJFA and related procedures must be followed when federal funds are used.

Emergency Situations

Unless competitive bidding is required by law, the superintendent may waive the requirement for competitive bids or proposals after determining that there exists a threat to life, property, public health or public safety or when immediate expenditure is necessary to protect against further loss of or damage to property or prevent or minimize a serious disruption in services. Emergency purchases shall be made with as much competition as is practical under the circumstances and only to the extent necessary to alleviate the emergency.

Debarred or Suspended Providers

The district will not do business with providers who have been suspended or debarred on a state or federal level. District employees are directed to verify that selected providers are in good standing before making a purchasing decision.

Confidentiality

Sealed bids and related documents will be kept confidential until bids are opened. District staff will not disclose offers, bids or price quotations to competitors except as necessary to conduct negotiations beneficial to the district or as required by law. All contract negotiations and related documents are considered closed until a contract is executed or all proposals are rejected.

Credit and Purchasing Cards

Authorized district employees and board members may use credit cards or purchasing cards issued to the district to make purchases for the district or pay for reasonable travel expenses incurred when performing official duties. Employees and board members will not use these cards to circumvent the bidding and purchasing requirements established by law and board policy. All purchases made using district cards must be attributed to the appropriate budget code and must conform to the board-adopted budget.

The district will use purchasing cards instead of credit cards to the extent feasible. Unless otherwise authorized by the board, only the superintendent and the purchasing officer will have access to a district credit card, and the board will set the amounts that may be charged to those cards.

The board will approve which employee positions will be issued district credit cards and the limitations on the cards. The superintendent, in consultation with the purchasing officer, will annually review and revise the list of persons receiving district cards and the limitations on those cards. The annual review will ensure that only the employees who appropriately utilize the cards have access to them and that the limitations on the cards do not exceed the amounts of the projected expenditures to be made with the cards. The board will annually review and approve all modifications prior to implementation.

Any employee or board member using a district card shall sign a card usage agreement and will receive training on applicable procedures for card use. District employees and board members issued a card must provide documentation, such as receipts and applicable budget codes, justifying expenditures. The purchasing officer will examine all documentation prior to payment and will notify the superintendent or designee immediately if any purchase was made in violation of law or district policies or procedures.

All employees and board members issued a district card must take all reasonable measures to protect the cards against damage, loss, theft or misuse. Any damage, loss, theft or misuse of the card must be reported to the superintendent immediately. No person may use the card other than the authorized employee or board member to whom the card was issued. District employees and board members will surrender all cards upon completion of their employment or term with the district or upon demand by the district.

Prohibited Activity and Reporting Requirements

The district expects all staff members to comply with the letter and intent of all district policies and procedures regarding purchasing. Under no circumstances may employees use district funds to make unauthorized or personal purchases. Staff members may not artificially divide purchases to avoid bidding requirements or design bid specifications to favor a particular provider.

All district employees must report suspected fraud, theft or misuse of district funds to the superintendent or purchasing officer immediately. District employees may be disciplined or terminated from employment for failing to follow board policy or district procedures and for any misuse of district resources, including district credit and purchasing cards.

The superintendent or purchasing officer will contact law enforcement and file a report or sign a complaint on behalf of the district in situations where a crime may have occurred.