

<p>SUBMIT BID TO: PURCHASING DEPARTMENT UNIVERSITY OF CENTRAL FLORIDA 12479 RESEARCH PARKWAY, BLDG. 600 ORLANDO, FL 32826 Phone: (407)823-2661 – Fax (407) 823-5551 www.purchasing.ucf.edu</p>	<p>University of Central Florida</p> <p>INVITATION TO BID</p> <p>Contractual Services</p> <p>Acknowledgment Form</p>
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Page 1 of 21 Pages	BIDS WILL BE OPENED April 28, 2015 @ 2:00PM and may not be withdrawn within _____ days after such date and time.	ITB NO. 1415CCSA
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UNIVERSITY MAILING DATE: March 16, 2015	ITB TITLE: OVERSEAS ACCIDENT AND SICKNESS INSURANCE FOR FACULTY/STAFF AND STUDENTS
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FEDERAL EMPLOYER IDENTIFICATION NUMBER OR S.S. NUMBER

VENDOR NAME	REASON FOR NO BID:
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VENDOR MAILING ADDRESS

CITY - STATE - ZIP CODE

AREA CODE	TELEPHONE NO.	<p>POSTING OF PROPOSAL TABULATIONS</p> <p>Bid tabulations with intended award(s) will be posted for review by interested parties at the Purchasing Department and our solicitation web page and will remain posted for a period of 72 hours. "Failure to file a protest in accordance with BOG regulation 18.002, or failure to post the bond or other security as required in BOG regulation 18.003, shall constitute a waiver of protest proceedings."</p>
	TOLL FREE NO.	
	FAX NO.	

Government Classifications
Check all applicable

- | | |
|---|--|
| <input type="checkbox"/> African American | <input type="checkbox"/> American Women |
| <input type="checkbox"/> Asian-Hawaiian | <input type="checkbox"/> Government Agency |
| <input type="checkbox"/> Hispanic | <input type="checkbox"/> MBE Federal |
| <input type="checkbox"/> Native American | <input type="checkbox"/> Non-Minority |
| <input type="checkbox"/> Non-Profit Organization | <input type="checkbox"/> Pride |
| <input type="checkbox"/> Small Business Federal | <input type="checkbox"/> Small Business State |

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm or person submitting a bid for the same materials, supplies, or equipment and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this bid and certify that I am authorized to sign this bid for the bidder and that the bidder is in compliance with all requirements of the Invitation to Bid, including but not limited to, certification requirements. In submitting a bid to an agency for the State of Florida, the bidder offers and agrees that if bid is accepted, the bidder will convey, sell, assign or transfer to the State of Florida all rights, title and interest in and to all causes of action it may now or hereafter acquire under the Anti-trust laws of the United States and the State of Florida for price fixing relating to the particular commodities or services purchased or acquired by the state of Florida. At the State's discretion, such assignment shall be made and become effective at the time the purchasing agency tenders final payment to the bidder.

GENERAL CONDITIONS

SEALED BIDS: All bid sheets and this form must be executed and submitted in a sealed envelope. (DO NOT INCLUDE MORE THAN ONE BID PER ENVELOPE.) The face of the envelope is to contain, in addition to the above address, the date, and time of the bid opening and the bid number. Bid prices not submitted on attached bid price sheets when required shall be rejected. All bids are subject to the terms and conditions specified herein. Those which do not comply with these terms and conditions are subject to rejection. The terms Contractor, Payee and Vendor are used interchangeably in this document.

1. EXECUTION OF BIDS: Each bid must contain a manual signature of the authorized representative in the space provided above. Each bid must be typed or printed in ink. Use of erasable ink is not permitted. All corrections to prices made by the bidder must be initialed. The company name and F.E.I.D. or social security number must appear on each pricing page of the Bidder as required.

2. NO BID SUBMITTED: If not submitting a bid, respond by returning only this bidder acknowledgment form, marking it "NO BID," and explain the reason in the space provided above. Failure to respond without justification may be cause for removal of the bidder's name from the bid mailing list. NOTE: To qualify as a respondent, bidder must submit a "NO BID," and it must be received no later than the stated bid opening date and hour.

AUTHORIZED SIGNATURE

AUTHORIZED NAME (TYPED/PRINTED)

TITLE

CONTACT NUMBER

3. BID OPENING: The bid opening shall be public, on the date, location and the time specified on the bid form. It is the bidder's responsibility to assure that the bid is delivered at the proper time and place of the bid opening. Bids which for any reason are not so delivered will not be considered. Offers by telegram or telephone are not acceptable. A bid may not be altered after opening of the bids unless allowed by the Director of Purchasing in accordance with established procedures.

NOTE: Bid tabulations will be posted at the Purchasing Department and can be furnished via email upon request. Only bid tabulations with minimal line items will be provided by telephone.

4. PRICES, TERMS AND PAYMENT: Firm prices should be bid and include all services/commodities rendered to the purchaser.

(a) TAXES: The State of Florida is a tax-immune sovereign and exempt from the payment of all sales, use and excise taxes.

(b) DISCOUNTS: Cash discount for prompt payment shall not be considered in determining the lowest net cost for bid evaluation purposes.

(c) MISTAKES: Bidders are expected to examine the conditions, scope of work, bid prices, extensions, and all instructions pertaining to the services involved. Failure to do so will be at the bidder's risk.

(d) INVOICING AND PAYMENT: All vendors must have on file a properly executed W-9 form with their Federal Employer Identification Number prior to payment processing.

Vendors shall submit properly certified original invoices to:

Finance & Accounting
12424 Research Parkway, Suite 300
Orlando, Florida 32726-3249

Invoices for payment shall be submitted in sufficient detail for a proper pre-audit and post-audit. Prices on the invoices shall be in accordance with the price stipulated in the contract at the time the order is placed. Invoices shall reference the applicable contract and/or purchase order numbers. Invoices for any travel expenses shall be submitted in accordance with the State of Florida travel rates at or below those specified in Section 112.061, Florida Statutes and applicable UCF policies. Travel Reimbursement must be made using the UCF Voucher for Reimbursement of Traveling Expenses available on the web at <http://www.fa.ucf.edu/forms/forms.cfm#>.

Final payment shall not be made until after the contract is complete unless the University has agreed otherwise.

Interest Penalties: Vendor interest penalty payment requests will be reviewed by the UCF ombudsman whose decision will be final.

Vendor Ombudsman: A vendor ombudsman position has been established within the Department of Finance & Accounting. It is the duty of this individual to act as an advocate for vendors who may be experiencing problems in obtaining timely payments(s) from the University of Central Florida. The Vendor Ombudsman can be contacted at (407) 823-1040 or by mail at the address in paragraph 4. (d) above.

The ombudsman shall review the circumstances surrounding non-payment to determine:

- if an interest payment is due;
- the amount of the payment; and
- shall ensure timely processing and submission of the payment request in accordance with University policy.

5. CONFLICT OF INTEREST: Submission of this Invitation to Bid (ITB) shall certify that the Bidder is aware of the requirements of Chapter 112, Florida Statutes and in compliance with the requirements of Chapter 112, Florida Statutes and other laws and regulations concerning conflicts of interests in dealing with entities of the State of Florida. The Bidder certifies that its directors and/or principal officers are not employed and/or affiliated with the University unless a current Conflict of Interest (Report of Outside Activity/Employment) form has been completed, executed by such director or officer and approved in accordance with applicable University policies or rules. Violation of this section by the Bidder shall be grounds for rejection of the bid or the cancellation of any contract or purchase order resulting from this ITB, without penalty to the University of Central Florida. No person or firm who receives a contract to perform a feasibility study for potential implementation of a subsequent contract, participates in the drafting of a competitive solicitation, assist in design or develops a program for future implementation shall be eligible to contract with the University of Central Florida for any project dealing with that specific subject matter. Bidders must disclose with their bids any such conflict of interest dealing with that specific subject matter in accordance with chapter 255,FS.

6. AWARDS: At the sole discretion of the University of Central Florida, the right is reserved to reject any and all bids or waive any minor irregularity or technicality in bids received. Bidders are cautioned to make no assumptions unless their bid has been evaluated as being responsive. Product substitutions may be submitted for evaluation of equivalency unless specifically indicated otherwise. Bidders shall have burden of proof of equivalency.

7. GOVERNMENTAL RESTRICTIONS: In the event any governmental restrictions may be imposed which would necessitate alteration of the material quality of the services offered on this bid performance of the items offered on this bid prior to their completion, it shall be the responsibility of the successful bidder to notify the purchaser at once, indicating in writing the specific regulation which requires an alteration. The University of Central Florida reserves the right to accept any such alteration, including any price adjustments occasioned thereby, or to cancel the contract at no expense to the University.

8. LEGAL REQUIREMENTS: Applicable provisions of all federal, state, county and local laws, and of all ordinances, rules and regulations shall govern development, submittal and evaluation of all bids received in response hereto and shall govern any and all claims and disputes which may arise between person(s) submitting a bid response hereto and the University of Central Florida, by and through its officers, employees and authorized representatives, or any other person, natural or otherwise: and lack of knowledge by any bidders shall not constitute a cognizable defense against the legal effect thereof.

9. ADVERTISING: In submitting a bid, the Bidder agrees not to use the results therefrom as a part of any commercial advertising.

10. ASSIGNMENT: Any contract or purchase order issued pursuant to this Invitation to Bid and the monies which may become due thereunder are not assignable, except with the prior written approval of the University of Central Florida. Under no circumstances shall the Bidder assign to a third party any right or obligation of the Bidder pursuant to any contract or purchase order resulting from this Invitation to Bid, without prior written consent of the University. If the Bidder is, or during the term of this Invitation to Bid or during the term of any contract or purchase order resulting from this ITB becomes an individual on the payroll of the State of Florida, the Bidder represents that he or she has complied with all applicable provisions of the Florida Statutes and Florida Administrative Code regarding outside or dual employment and compensation.

11. FACILITIES: The University reserves the right to inspect the Bidder's facilities at any time with prior notice.

12. PUBLIC RECORDS: Any contract or purchase order issued pursuant to this Invitation to Bid may be canceled unilaterally by the University for refusal by the Bidder to allow public access to all papers, documents, letters or other material subject to the provisions of Chapter 119, Florida Statutes, and made or received by the Bidder in conjunction herewith or any contract or purchase order issued pursuant to this Invitation to Bid.

13. RECORDS: The Bidder agrees to keep and maintain, separate and independent records, in accordance with generally accepted accounting principles, devoted exclusively to its obligations and activities pursuant to a contract or purchase order issued pursuant to this Invitation to Bid. Such records (including books, ledgers, journals, and accounts) shall contain all entries reflecting the business operations under a contract or purchase order issued pursuant to this Invitation to Bid. University or its authorized agent shall have the right to audit and inspect such records from time to time during the term of a contract or purchase order issued pursuant to this Invitation to Bid, upon reasonable notice to the Bidder.

14. Orders shall be processed only upon receipt of an authorized purchase order issued by University of Central Florida. All orders shall be initiated on an as needed basis throughout the term of the contract. Orders shall be promptly filled and delivered. Any item or items received that do not meet specifications or duplicate shipments received will be returned at vendor's expense.

OVERSEAS ACCIDENT AND SICKNESS INSURANCE FOR FACULTY/STAFF AND STUDENTS, ITB1415CCSA

INTRODUCTION

The objective of this Invitation to Bid (ITB) is to enable the University of Central Florida (UCF) to enter into an agreement with a vendor to provide accident and sickness insurance to faculty, staff and students traveling outside of the United States on university business and/or study. The University expects that the selected vendor will make the contract available to the State of Florida University System. Any purchases made under the awarded contract shall be between each individual school and the vendor. Any contract or agreement that requires signatures must be signed by the participating school or entity.

The insurance is to include coverage for medical expenses relating to accidents and sickness which arise during a covered trip, evacuation for emergency medical, military or political unrest, and natural disasters, and accidental death and dismemberment benefit.

The University of Central Florida is a comprehensive coeducational institution offering undergraduate, graduate, medical, and international programs, and is part of the State University System of Florida.

The University of Central Florida and its 12 colleges provide opportunities to over 60,000 students from all 50 states and 140 countries. UCF employs approximately 10,000 faculty and staff. Offering 212 degree programs, it has become an academic and research leader in numerous fields, such as optics, modeling and simulation, engineering and computer science, business administration, education, science, hospitality management and digital media.

Additional information available at: http://www.ucf.edu/about_ucf

State of Florida University System

Florida A&M University, Tallahassee; Florida Atlantic University, Boca Raton; Florida Gulf Coast University, Ft. Myers; Florida State University, Tallahassee; University of Central Florida, Orlando; New College of Florida, Sarasota; University of Florida, Gainesville; University of North Florida, Jacksonville; University of South Florida, Tampa; University of West Florida, Pensacola; Florida International University, Miami; and Florida Polytechnic, Polk City.

In the first year, we anticipate two additional schools (Florida Atlantic University and University of South Florida) to use this contract. Their travel data is provided herein.

1. POSTING OF BID TABULATIONS:
 - A. Bids will be opened at the Purchasing Department at the assigned date and time identified in this ITB.
 - B. Bid tabulations will be posted at such time as the Purchasing Department provides notice of intended decision or until 30 days after a public opening of the bids, whichever is earlier.
 - C. Notice of a decision or intended decision of award will be electronically posted for a period of 72 hours.
 - D. Failure to file a protest in accordance with BOG regulation 18.002, or failure to post the bond or other security as required in BOG regulation 18.003, shall constitute a waiver of protest proceedings.

2. BID OPENING: Bids will be received and opened **April 28, 2015 at 2:00PM** in the Purchasing Department, Orlando Tech Center, 12479 Research Parkway, Bldg. 600, Orlando, Florida 32826. Time of opening will be local date and time at this location. Purchasing will not extend the bid opening to accommodate vendors that did not discover the ITB early enough to place a bid. **Bidders will submit an original hard copy and 6 electronic (CD or flash drive) copies. BID DOCUMENTS CAN TO BE OBTAINED AT:**

<http://www.purchasing.ucf.edu/bids/index.asp>

3. **ADDITIONAL INFORMATION & QUESTIONS:** We encourage questions or comments which might aid in the improvement of our existing specifications. The university will not give verbal answers to inquiries regarding the specifications, or verbal instructions prior to or after award of the bid. A verbal statement regarding same by any person shall be non-binding. The university is not liable for any increased cost resulting from the bidder accepting verbal direction. All changes, if necessary, are made by written addendum to the bid.

Any explanation desired by vendors must be requested of the University of Central Florida Purchasing Department **in writing** by **April 7, 2015 at 12 NOON**. Inquiries are to be legible and concise and clearly identify the bidder who is submitting the inquiry. Specifications, terms and conditions may not be changed except by formal written addendum, issued by UCF. Direct all inquiries/questions, preferably via email to:

Christine Tangel
University of Central Florida
Purchasing Department
12479 Research Parkway, Bldg. 600
Orlando, Florida 32826
Ph. 407-823-2661
Fax 407-823-5551
christine.tangel@ucf.edu

4. **DELIVERY:** Specify delivery date after receipt of order in terms of days or weeks on bid sheet. Failure to do this may be cause for rejection of the bid. Commodities delivery is to be made to UCF's Central Receiving location (UCF, Building 16E, Libra Drive, Orlando, FL 32816). When delivery is specified to a location other than the University's Central Receiving Department, vendor shall direct its carrier to telephone the University's Central Receiving Department before unloading. Delivery of all shipments shall occur between 9:00 a.m. and 4:00 p.m., Mondays through Fridays only, except on State of Florida or U.S. holidays. The University of Central Florida is committed to sustainable practices. Palletized shipments should not exceed 1500 pounds per pallet and when possible, should be shipped on a 40"x48" pallet. Payee shall include a packing list showing contents of shipment (if shipment is made in two or more containers). No boxing, packing, installation, assembly, or similar charges (not included in the item price) will be allowed unless expressly and specifically authorized in writing by the University on the face of any purchase order or contract resulting from this ITB.
5. **PARKING:** The Payee shall ensure that all vehicles parked on campus for purposes relating to work resulting from this ITB shall have proper parking permits. This applies to all personal vehicles and all marked and unmarked company vehicles that will be on any University campus for one (1) day or more or on a recurring basis. All such vehicles must be registered with University's Parking Services Department, and parking permits must be purchased by the Payee. Payee's vehicle(s) shall observe all parking rules and regulations. Failure to obtain parking permits, properly display them, and otherwise comply with all of University's parking rules and regulations could result in the issuance of a parking ticket and/or towing at the expense of Payee or Payee's employees. UCF's Parking Services Department can be contacted at (407) 823-5812 for additional information pertaining to parking and parking fees/rates.
6. **EMPLOYMENT OF ALIENS:** The employment of unauthorized aliens by any Contractor is considered a violation of Section 274A(e) of the Immigration and Nationality Act. If the contractor knowingly employs unauthorized aliens, such violation shall be cause for unilateral cancellation of the contract by the University without penalty to the University.
7. **AVAILABILITY OF FUNDS:** The obligations of the University under this award are subject to the availability of funds lawfully appropriated annually for its purposes by the Legislature of the State of Florida.
8. **AWARD:** All or none basis.

Bids shall be awarded based on the lowest, responsive, responsible bidder, which meets specifications with consideration being given to the specific quality of the product, conformity to the specifications, suitability to the university's needs, delivery terms, qualifications, and past performance.

9. **ADDITIONAL QUANTITIES:** The University reserves the right to increase or decrease total quantities as necessary. The University can order additional quantities of the same commodities solicited as long as it is within 120 days after expiration of the contract resulting from this ITB. Total additional quantities, if any, are unknown.
10. **CANCELLATION/TERMINATION:** UCF may terminate a contract resulting from this ITB without cause on thirty (30) days' advanced written notice to the vendor. The parties to the contract resulting from this ITB may terminate that contract at any time by mutually consenting in writing. Either party may terminate the contract resulting from this ITB immediately for breach by the other that remains substantially uncured after thirty (30) days' advanced written notice to the breaching party, which notice describes the breach in detail sufficient to permit cure by the breaching party. The University shall be liable only for payment for services satisfactorily rendered or goods satisfactorily delivered and accepted from the date of commencement until the effective date of cancellation/termination.
11. **TERM OF CONTRACT:** : The contract resulting from this ITB, if any, will be for an annual policy beginning on August 21, 2015 at 12:00 am EST to August 20, 2016 at 11:59 pm EST with UCF and the selected service/commodity(s) provider having the option to renew contract as mutually agreed to by both parties.

The original annual policy cannot be extended but may be renewed at the University's request and upon Payee's acceptance subject to rates, deductibles, limits, terms and conditions to be agreed upon. Such renewal will only apply to travel beginning on or after the expiration date of the original annual policy. Any travel prior to the renewal of the policy shall be held covered at the rates, deductibles, limits, terms and conditions of the ensuing policy within which the travel took place. The Payee shall submit the renewal premium rate to the University no later than 90 days prior to policy expiration for review at which time the University may elect to make changes to the renewal policy or allow the policy to terminate. The University retains the right to renegotiate the contract renewal with the Payee ninety (90) days prior to contract expiration date.

12. **PAYEE INSURANCE.** For all purchases under this ITB of \$10,000 or below, Payee will have and maintain types and amounts of insurance that at a minimum cover the Payee's (or subcontractor's) exposure in performing any contract resulting from this ITB. For all purchases that exceed \$10,000 (i.e. \$10,000.01 and up) and/or all purchases that require a UCF SAFE Form, Payee will have and maintain general liability insurance in an amount of no less than one (1) million dollars per occurrence and Payee shall send a copy of Payee's Certificate of Insurance (prior to commencement of Payee's performance or delivery hereunder) to the following address by email, fax or mail:

e-mail: ehs@ucf.edu
Fax: 407-823-0146
Mail: University of Central Florida
PO Box 163500
Orlando FL 32816-3500

UCF has the right to deviate from any of the above insurance requirements, if UCF, at UCF's sole discretion decides to do so. If UCF decides to deviate from the above noted insurance requirements, UCF will inform the Payee in writing in those particular circumstances. Unless UCF notifies a Payee in writing that UCF is willing to deviate from the insurance requirements noted above, all of the above insurance requirements shall apply to the Payee. The University and its Board of Trustees shall be listed as an additional insured on any Certificate of Insurance issued and named on the Additional Insured Endorsement. The Certificate Holder is to read the following:

University of Central Florida
Board of Trustees
4000 Central Florida Blvd.
Orlando FL 32816

INSURANCE, WORKER'S COMPENSATION

The Contractor/Payee/Vendor shall take out and maintain during the life of the contract resulting from this ITB, if any, Worker's Compensation Insurance for all of his/her employees connected with the work of this project and, in case any work is sublet, the Contractor/Payee/Vendor shall require the subcontractor similarly to provide Worker's Compensation Insurance for all of the latter's employees unless such employees are covered by the protection afforded by the Contractor/Payee/Vendor. Such insurance shall comply fully with the Florida Worker's Compensation Statutes Chapter 440. In case any class of employees engaged in hazardous work under this contract at the site of the project is not protected under the Worker's Compensation statute, the Contractor/Payee/Vendor shall provide, and cause each subcontractor to provide adequate insurance, satisfactory to the University, for the protection of his/her employees not otherwise protected.

- 13. USE OF CONTRACT BY OTHER GOVERNMENT AGENCIES: At the option of the Contractor/Payee/Vendor, the use of the contract resulting from this ITB, if any, may be extended to other governmental agencies, including the State of Florida, its agencies, political subdivisions, counties, and cities.

Each governmental agency allowed by the Contractor/Payee/Vendor to use the contract resulting from this ITB, if any, shall do so independent of any other governmental entity. Each agency shall be responsible for its own purchases and shall be liable only for goods or services ordered, received and accepted. No agency receives any liability by virtue of this bid and subsequent contract award.

- 14. PUBLIC ENTITY CRIMES: A person or affiliate who has been placed on Florida's convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded, or perform work as a contractor, supplier, subcontractor, or consultant under, a contract with any public entity, and may not transact business with any public entity in excess of the bid limit for that public entity, for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

- 15. FLORIDA PREFERENCE. For purchases of tangible personal property, Florida legislature has enacted economic development laws establishing certain conditions and circumstances which, when applicable, require the granting of price preferences to businesses whose principal place of business is the State of Florida. Pursuant to §287.084 Florida Statute, award recommendations shall make appropriate adjustments to Resident Vendor pricing when considering solicitations from Bidders having a principal place of business outside the State of Florida. All Bidders must complete and submit Attachment 1 with the response to this solicitation. Failure to comply shall be considered non-responsive to the terms of this solicitation. Refer to <http://www.leg.state.fl.us/Statutes/index.cfm> or <http://regulations.ucf.edu/chapter7/index.html> 3.g.1.c for additional information regarding this Statute and its applicability.

- 16. IDENTICAL TIE BIDS: Preference shall be given to businesses with drug-free workplace programs. Whenever two or more bids which are equal with respect to price, quality, and service are received by the State or by any political subdivision for the procurement of commodities or contractual services, a bid received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. If none, or all of the tied vendors have a drug-free workplace program, vendors with Florida as their primary location will receive preference. Failing the above, a coin flip will be used to determine the winning vendor. In order to have a drug-free workplace program, business's drug free policy shall be in accordance with applicable State and Federal laws.

As the person authorized to sign the statement, my initials certify that this firm complies fully with the above requirements. Initials: _____

- 17. EQUAL OPPORTUNITY STATEMENT: The State Universities have established equal opportunity practices which conform to both the spirit and the letter of all laws against discrimination and prohibits discrimination based on race, creed, color, sex, age, national origin, marital status or religion. To be considered for inclusion as a supplier under this agreement, the bidder commits to the following:

- A. The provisions of Executive Order 11246, September 24, 1996, and the rules, regulations, and relevant orders of the Secretary of Labor are applicable to each order placed against this agreement regardless of value.
- B. If the bidder expects to receive \$10,000 in orders during the first 12 months of this agreement, a complete certificate of non-segregated facilities shall be included in the proposal response.
- C. If the bidder expects to receive \$50,000 in orders during the first 12 months of this agreement and employs more than 50 people, standard form 100 (EEOO-1) must be filed prior to March 1 of each year.
- D. If the bidder expects to receive \$50,000 in orders during the first 12 months and employs more than 50 people, a written program for affirmative action compliance must be maintained by the bidder, subject to review upon request by the user agencies of the contract resulting from this ITB.

If you have already complied with the above, please initial: _____

18. **WORK FOR HIRE.** Any work specifically created for the University under an agreement resulting from this ITB by the Payee or anyone working on behalf of the Payee (the term Payee shall encompass both) shall be considered a "work for hire." All designs, prints, paintings, artwork, sketches, etchings, drawings, writings, photographs, or any other work or material or property produced, developed or fabricated and any other property created hereunder, including all material incorporated therein and all preliminary or other copies thereof, (the "Materials") shall become and remain the property of the University, and, unless otherwise specifically set forth herein, shall be considered specially ordered for the University as a "work made for hire," or, if for any reason held not to be a "work for hire,"

The Payee who created, produced, developed or fabricated the Materials hereunder (or under any contract resulting from this ITB) assigns all of his/her right, title and interest in the Materials to the University. The University shall own all right, title and interest in the Materials. The Payee agrees upon request to execute any documents necessary to perfect the transfer of such title to the University. The Materials shall be to the University's satisfaction and are subject to the University's approval. The Payee bears all risk of loss or damage to the Materials until the University has accepted delivery of the Materials. The University shall be entitled to return, at the Payee's expense, any Materials which the University deems to be unsatisfactory. On or before completion of the Payee's services hereunder, the Payee must furnish the University with valid and adequate releases necessary for the unrestricted use of the Materials for advertising or trade purposes, including model and property releases relating to the Materials and releases from any persons whose names, voices or likenesses are incorporated or used in the Materials.

The Payee hereby represents and warrants that, (a) all applicable laws, rules and regulations have been complied with, (b) the Payee is free and has full right to enter into this ITB and any contract resulting from this ITB, if any, and perform all of its obligations hereunder and under such contract, (c) the Materials may be used or reproduced for advertising or trade purposes or any commercial purposes without violating any laws or the rights of any third parties and (d) no third party has any rights in, to, or arising out of, or in connection with the Materials, including without limitation any claims for fees, royalties or other payments. The Payee agrees to indemnify and hold harmless the University and those acting for or on its behalf, the UCF Board of Trustees, the State of Florida and the Florida Board of Governors and their respective officers, agents, employees and servants from and against any and all losses, claims, damages, expenses or liabilities of any kind, including court costs and attorneys' fees, resulting from or in any way, directly or indirectly, connected with (a) the performance or non-performance of the University's order by the Payee, (b) the use or reproduction in any manner, whatsoever, or (c) any breach or alleged breach of any of the Payee's agreements or representations and warranties herein or in any contract resulting from this ITB.

19. **AMENDMENTS.** No changes or amendments to an agreement resulting from this ITB are binding on the University unless made in legible writing that is signed by an attorney in the University's General Counsel's Office and an authorized UCF signatory. Payee shall return an agreement resulting from this ITB to the University's Purchasing Department at once with a written explanation if the agreement resulting from this ITB is not acceptable in its entirety.

20. **EXPORT CONTROL.** The parties shall comply with all applicable U.S. export control laws and regulations, including but not limited to the International Traffic in Arms Regulations (ITAR), 22 CFR Parts 120 through 130, the Export Administration Regulations (EAR), 15 CFR Parts 730 through 799 and/or other restrictions imposed by the Treasury Department's Office of Foreign Asset Controls (OFAC), in the performance of an agreement resulting from this ITB. The parties agree that no technology, related data or information will be exchanged or disseminated under such agreement nor any collaboration conducted pursuant to such agreement, which are export controlled pursuant to the export control laws of the United States, including the EAR and the ITAR and any other applicable regulations. The Parties agree that the Payee will not provide the University with any ITAR or EAR restricted technology and/or related data, and that any ITAR or EAR restricted technologies and/or data produced in furtherance of the agreement resulting from this ITB, if any, will be in the exclusive possession of the Payee and at no time will any export controlled technologies, related data, or information be intentionally or inadvertently transferred to the University, its facilities, labs, staff, researchers, employees, officers, agents, servants or students in the performance of that agreement.

If the Payee wishes to disclose export controlled technology or technical data to the University, the Payee will, prior to disclosing any information, technical data or source code that is subject to export controls under federal law, notify the University in writing that the material is export controlled and shall identify the controls that apply. The University shall have the right to decline or limit (a) the receipt of such information, and (b) any task requiring receipt of such information. In the event the Payee sends any such technical data or product that is subject to export control, without notice of the applicability of such export control, the University has the right to immediately terminate the agreement resulting from this ITB, if any. The Payee understands and agrees that to the extent the Payee's personnel have access to work or materials subject to U.S. export controls while on University property, such personnel will meet all federal export control regulatory requirements or have the appropriate U. S. government approval.

21. **FORCE MAJEURE.** No default, delay or failure to perform on the part of UCF or the Vendor shall be considered a default, delay or failure to perform otherwise chargeable, hereunder, if such default, delay or failure to perform is due to causes beyond the Vendor's or UCF's reasonable control including, but not limited to, strikes, lockouts, actions or inactions of governmental authorities, epidemics, war, embargoes, fire, earthquake, acts of God, default of common carrier. In the event of such default, delay or failure to perform due to causes beyond the Vendor's or UCF's reasonable control, any dates or times by which the parties are otherwise scheduled to perform shall be extended automatically for a period of time equal in duration to the time lost by reason of the cause beyond the reasonable control of the parties.
22. **INDEMNIFICATION.** Payee shall hold the University and the UCF Board of Trustees and the University's officers, employees, agents and/or servants harmless and indemnify each of them against any and all liabilities, actions, damages, suits, proceedings, and judgments from claims arising or resulting from the acts or omissions of Payee, its employees, its agents or of others under Payee's control and supervision. If any part of a delivery to the University pursuant to an agreement resulting from this ITB, if any, is protected by any patent, copyright, trademark, other intellectual property right or other right, Payee also shall indemnify and hold harmless the University and the UCF Board of Trustees and the University's officers, employees, agents and/or servants from and against any and all liabilities, actions, damages, suits, proceedings and judgments from claims instituted or recovered against the University by any person or persons whomsoever on account of the University's use or sale of such article in violation of rights under such patent, copyright, trademark, other intellectual property right or other right.
23. **INDEPENDENT CONTRACTOR.** Each of the parties is an independent contractor and nothing contained herein shall constitute or designate any of the employees or agents of one party as employees or agents of the other party.
24. **NO JOINT VENTURE.** Nothing contained in an agreement resulting from this ITB, if any, shall be construed to create a joint venture, partnership, or other like relationship between the parties.
25. **LEASED EQUIPMENT.** The risk of loss or damage to leased equipment, goods or property shall not transfer to the University except as provided in §680.219, Florida Statutes. Any security interest in the leased equipment, goods or property granted to Payee contrary to AGO 79-72 and AGO 80-9 is null and void. Limitation of remedies provisions, which are unconscionable under applicable Florida law, are void.

26. MATERIAL SAFETY DATA SHEET (MSDS). In compliance with Florida Statutes, Ch. 442, a Material Safety Data Sheet (MSDS) must accompany any applicable item delivered under an agreement resulting from this ITB, if any.
27. WAIVER/REMEDIES. No failure or delay by a party hereto to insist on the strict performance of any term of an agreement resulting from this ITB, if any, or to exercise any right or remedy consequent to a breach thereof, shall constitute a waiver of any breach or any subsequent breach of such term. No waiver of any breach hereunder shall affect or alter the remaining terms of such agreement, but each and every term of such agreement shall continue in full force and effect with respect to any other then existing or subsequent breach thereof. The remedies provided in an agreement resulting from this ITB, if any, are cumulative and not exclusive of the remedies provided by law or in equity.
28. DISPOSITION OF BIDS; FLORIDA PUBLIC RECORDS LAW COMPLIANCE
All bids become the property of the State of Florida, and the State of Florida shall have the right to use all ideas, and/or adaptations of those ideas, contained in any bid received in response to this solicitation. Any parts of the bid or any other material(s) submitted to UCF with the bid that are copyrighted or expressly marked as "confidential", "proprietary", or "trade secret", will only be exempted from the "open records" disclosure requirements of Chapter 119, Florida Statutes, if Florida law specifically recognizes these materials as exempt from disclosure. Thus, the mere designation as "confidential", "proprietary", or "trade secret" by a vendor does not ensure that such materials will be exempt from disclosure. In the absence of a specific Florida statute exempting material from the public records law, UCF is legally obligated to produce any and all public records produced or received in the course of conducting university business, irrespective of any designation by the vendor of those same records as "confidential", "proprietary", or "trade secret." The ultimate determination of whether a vendor's claim of "confidential," "proprietary" or "trade secret" will support an exemption from disclosure will be made by UCF or, potentially, a court. UCF's selection or rejection of a bid will not affect this provision.
29. PUBLIC RECORDS, CONTRACT FOR SERVICES: COMPLIANCE OF SECTION 119.0701, FS
To the extent that Payee meets the definition of "contractor" under Section 119.0701, Florida Statutes, in addition to other contract requirements provided by law, Payee must comply with public records laws, including the following provisions of Section 119.0701, Florida Statutes:
- A. Keep and maintain public records that ordinarily and necessarily would be required by the public agency in order to perform the service.
 - B. Provide the public with access to public records on the same terms and conditions that the public agency would provide the records and at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes, or as otherwise provided by law.
 - C. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law.
 - D. Meet all requirements for retaining public records and transfer, at no cost, to the public agency all public records in possession of the contractor upon termination of the contract and destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the public agency in a format that is compatible with the information technology systems of the public agency.

If Payee does not comply with a public records request, University shall enforce the contract provisions in accordance with the contract.

30. Licensor acknowledges that Licensee has a duty to maintain the privacy of student records, including without limitation education records as defined by the Family Educational Rights and Privacy Act (20 USC § 1232g; 34 CFR Part 99) ("FERPA"), and further acknowledges that as a contractor to whom Licensee has outsourced certain institutional services or functions:
- A. Confidential information about Licensee's students is contained in records provided to and maintained by Licensor, and Licensor will protect the privacy of all student education records to the fullest extent required of Licensee under FERPA;

- B. Licensors are performing an institutional service or function that has been outsourced by Licensee and for which Licensee would otherwise use its employees;
- C. Licensors are under the direct control of Licensee with respect to the use and maintenance of education records, as defined by FERPA;
- D. Licensors are subject to all FERPA requirements governing the use and re-disclosure of personally identifiable information from education records, including without limitation the requirements of 34 CFR § 99.33(a);
- E. Even in circumstances that might justify an exception under FERPA, Licensors may not disclose or re-disclose personally identifiable information unless Licensee has first authorized in writing such disclosure or re-disclosure; and Licensors will not use any personally identifiable information acquired from Licensee for any purpose other than performing the services or function that are the subject of this agreement.

31. COMPLIANCE: The parties shall at all times comply with all applicable ordinances, laws, rules and regulations of local, state and federal governments, or any political subdivision or agency, or authority or commission thereof, which may have jurisdiction to pass laws, ordinances, or make and enforce rules and regulations with respect to the parties.

Vendors shall certify below that they are in good standings to conduct business in the State of Florida. **The awardee of any contract resulting from this solicitation shall forward a certification of good standing. The certifications must be submitted to the UCF Purchasing Department prior to providing any goods or services required under the resulting contract.** Noncompliance with this provision may constitute rejection of bids or termination of a contract at UCF's sole discretion.

CERTIFICATION

I certify that the company submitting a bid under this solicitation is in compliance with all applicable laws to conduct business in the State of Florida, is in good standings and will provide a certificate of good standings from the State of residence prior to initiating any performance under any contract resulting from this solicitation.

Company: _____

Authorized Representative's Name: _____

Authorized Representative's Signature: _____

Date: _____

BID SHEET

Line Item	Qty.	Item Description	Unit Price*	Extended Price
001		Faculty and Staff Policy; please provide 'sample' policy		
002		Student Policy; please provide 'sample' policy		

Total \$ _____

- Note:
- a. The unit price submitted in response to this ITB should enumerate a **Deposit Premium**.
 - b. If the policy is subject to an audit, the rate per person per time period (i.e. day, week, month, and year) is to be included with your submittal.

Does your bid meet our specifications exactly? Yes No

If No, please detail how your bid meets or exceeds the specifications of the required item(s) and provide proof that verifies your claim.

Prices quoted are good for at least _____ days following bid opening.

Delivery will be _____ days after receipt of order.

F.O.B. delivered to UCF

Payment terms: _____.

I certify that this bid is made without prior understanding, agreement or connection with any corporation, firm, or person submitting a bid for the same materials, supplies or equipment, and in all respects fair and without collusion or fraud. The following information, including an authorized representative signature and witness, is required to be submitted with your bid in order to be considered for evaluation and award. The person signing below acknowledges and agrees with all proposed information as submitted and has the authorization of the said company to enter into a contractual agreement with the University for the purposes as proposed and as described herein. Please print below unless where a signature is required.

COMPANY NAME

AUTHORIZED SIGNATURE

MAILING ADDRESS

PRINTED NAME

CITY, STATE, ZIP CODE

TITLE

(_____) _____
PHONE NUMBER

(_____) _____
FAX NUMBER

E-MAIL ADDRESS

ITB Specifications

1. **QUALIFICATION OF BIDDERS:** This bid will be awarded only to a responsible bidder, qualified by experience and in a financial position to provide the items specified. In order to facilitate the prompt award of this bid, the bidder is to submit with the bid the following information below. Failure to submit any of the following may result in rejection of your bid. UCF reserves the right to request this information at any time before award:

- A. Provide the Certificate of Authority issued by Florida Office of Insurance Regulation, showing the firm is licensed and an authorized insurer in the State of Florida
- B. Provide documentation showing the firm is has an A- rating (minimum) from A.M. Best and A rating (minimum) from Standard and Poor.
- C. Provide documentation showing the firm has worldwide presence with offices and operations in North and South America, Europe, Africa, Asia and Australia capable of assisting faculty, staff and students in any region in the world.
- D. Provide a list of current higher education client accounts, if any, which are located in the United States where they are providing insurance described in section 1.1. Client account information shall include contact name, address, phone number, length of service.
- E. Provide a list of client accounts lost through early termination or non-renewal over the past five (5) years. Include contact name and phone number, length of service at each account, and reason for loss.

The policy is to be written as Primary to all other insurance, including health insurance and workers compensation insurance, which may provide coverage.

Required Coverages with Limits:

MANDATORY – coverage limits are not negotiable.

NON-MANDATORY -- preferred coverage limits – vendor may propose alternate coverage limits

1. FACULTY AND STAFF POLICY

a. COVERED PERSONS AND ACTIVITIES – **MANDATORY**

- ❖ All Faculty and Staff members traveling outside of the United States on UCF business
- ❖ All Faculty and Staff members participating in Volunteer UCF through the UCF Office of Student Involvement outside of the United States for volunteer activities sponsored and supervised by UCF
 - Personal Deviation for 10 days:
 - An activity not reasonable related to UCF business or incidental to the purpose of the trip.

COVERAGES AND LIMITS

I. Medical Expense Benefits per Accident or Sickness: - **MANDATORY**

Maximum per Faculty or Staff Member	\$250,000
Deductible	\$0
Co-insurance Rate	100% of the usual and customary charges
Incurral Period	90 days after the date of Covered Accident or Sickness
Maximum Benefit Period	The earlier of the date of the Covered Person's trip ends or 364 days from the date of a Covered Accident or Sickness
Maximum for Dental Treatment	\$100 per tooth up to a maximum of \$500

Maximum for Preexisting Conditions	\$250,000 (same a Maximum per Faculty or Staff member)
Maximum for Emergency Medical Treatment of Pregnancy	\$250,000 (same a Maximum per Faculty or Staff member)
Maximum for Room & Board Charges	Average semi-private rate per day
Maximum for ICU Room & Board Charges	Two times the average semi-private rate per day
Maximum for Chiropractic Care (Subject to 80% co-insurance rate of usual and customary charges)	\$50 per visit up to a maximum of 10 visits
Maximum for Mental and Nervous Disorders Inpatient Outpatient	\$5,000 per Policy Term, 30 days maximum \$1,000 per Policy Term, 10 visits maximum
Maximum for Newborn Nursery Care	\$500
Maximum for Prescription Drugs (inpatient and outpatient co-insurance)	100% of the usual and customary charges
Maximum for Therapeutic Termination of Pregnancy	\$500

II. Other Medical Expense Benefits per Accident or Sickness: - **MANDATORY**

Maximum Emergency Medical	\$10,000
Maximum Emergency Medical Evacuation	\$250,000 (same a Maximum Medical Expense per Faculty or Staff member)
Maximum Repatriation of Remains	\$250,000 (same a Maximum Medical Expense per Faculty or Staff member)

III. Emergency Reunion Benefit per Accident or Sickness: - **MANDATORY**

Maximum per Faculty or Staff Member	\$12,500
Daily Maximum per Faculty or Staff Member	\$300
Maximum number of days	10
Maximum Repatriation of Remains	\$2,500

IV. Security Evacuation Expense Benefit per Occurrence: - **MANDATORY**

Maximum per Faculty or Staff Member	\$25,000
Aggregate Limit per Occurrence	\$250,000

V. Accidental Death & Dismemberment Benefit per Accident:

Principal Sum - MANDATORY	\$50,000
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a. Schedule of Covered Losses: - **NOT MANDATORY**

Life	100% of the Principal Sum
Two or more Members	100% of the Principal Sum
One Member	50% of the Principal Sum
Thumb and Index Finger of the same Hand	25% of the Principal Sum

b. Definitions: - **MANDATORY**

- i. Member: loss of hand or foot (complete severance through or above wrist or ankle joint), loss of sight (total and permanent loss of one eye), loss of speech (total and permanent loss of audible communication) and loss of hearing (total and permanent in both ears)

1. ADDITIONAL COVERED ACTIVITIES - **MANDATORY**

- I. Hazardous activities: to include, but not limited to, scuba diving, skiing, hang gliding, zip lining, sky diving, bungee jumping, mountain climbing and parasailing.

B. STUDENT POLICY

1. COVERED PERSONS AND ACTIVITIES - MANDATORY

- I. All students engaging in educational activities sponsored by UCF while traveling outside of the United States.
- II. All students participating in Volunteer UCF through the UCF Office of Student Involvement outside of the United States for volunteer activities sponsored and supervised by UCF
- III. Personal Deviation for 10 days:
 - a. An activity not reasonable related to UCF sponsored educational activity or incidental to the purpose of the trip.

2. COVERAGES AND LIMITS

I. Medical Expense Benefits per Accident or Sickness: - MANDATORY

Maximum per Student	\$250,000
Deductible	\$0
Co-insurance Rate	100% of the usual and customary charges
Incurral Period	90 days after the date of Covered Accident or Sickness
Maximum Benefit Period	The earlier of the date of the Covered Person's trip ends or 364 days from the date of a Covered Accident or Sickness
Maximum for Dental Treatment	\$100 per tooth up to a maximum of \$500
Maximum for Preexisting Conditions	\$250,000 (same a Maximum per Faculty or Staff member)
Maximum for Emergency Medical Treatment of Pregnancy	\$250,000 (same a Maximum per Faculty or Staff member)
Maximum for Room & Board Charges	Average semi-private rate per day
Maximum for ICU Room & Board Charges	Two times the average semi-private rate per day
Maximum for Chiropractic Care (Subject to 80% co-insurance rate of usual and customary charges)	\$50 per visit up to a maximum of 10 visits
Maximum for Mental and Nervous Disorders Inpatient	\$5,000 per Policy Term, 30 days maximum
Outpatient	\$1,000 per Policy Term, 10 visits maximum
Maximum for Newborn Nursery Care	\$500
Maximum for Prescription Drugs (inpatient and outpatient co-insurance)	100% of the usual and customary charges
Maximum for Therapeutic Termination of Pregnancy	\$500

II. Other Medical Expense Benefits per Accident or Sickness: - MANDATORY

Maximum Emergency Medical	\$10,000
Maximum Emergency Medical Evacuation	\$250,000 (same a Maximum Medical Expense per Faculty or Staff member)
Maximum Repatriation of Remains	\$250,000 (same a Maximum Medical Expense per Faculty or Staff member)

III. Emergency Reunion Benefit per Accident or Sickness: - MANDATORY

Maximum per Student	\$12,500
Daily Maximum per Student	\$300
Maximum number of days	10
Maximum Repatriation of Remains	\$2,500

IV. Home Country Emergency Benefit per Accident or Sickness: - **MANDATORY**

Maximum per Student	\$10,000
Deductible	\$0
Maximum Benefit Period	30 days

V. Home Country Extension Benefit per Accident or Sickness: - **MANDATORY**

Maximum per Student	\$10,000
Deductible	\$0
Maximum Benefit Period	30 days

VI. Security Evacuation Expense Benefit per Occurrence: - **MANDATORY**

Maximum per Student	\$25,000
Aggregate Limit per Occurrence	\$250,000

VII. Accidental Death & Dismemberment Benefit per Accident:

Principal Sum - MANDATORY	\$50,000
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a. Schedule of Covered Losses: - **NOT MANDATORY**

Life	100% of the Principal Sum
Two or more Members	100% of the Principal Sum
One Member	50% of the Principal Sum
Thumb and Index Finger of the same Hand	25% of the Principal Sum

b. Definitions: - **MANDATORY**

- i. Member: loss of hand or foot (complete severance through or above wrist or ankle joint), loss of sight (total and permanent loss of one eye), loss of speech (total and permanent loss of audible communication) and loss of hearing (total and permanent in both ears)

3. ADDITIONAL COVERED ACTIVITIES - **MANDATORY**

- I. Hazardous activities: to include, but not limited to, scuba diving, skiing, hang gliding, zip lining, sky diving, bungee jumping, mountain climbing and parasailing.
- II. Commission of or active participation in a riot or insurrection.
- III. A Student legally intoxicated as determined according to the laws of the jurisdiction in which the injury occurred.
- IV. Injury sustained while participating in club or intramural sports.

C. DEFINITIONS

1. MEDICAL EXPENSES - APPLIES TO BOTH THE FACULTY/STAFF POLICY AND STUDENT POLICY -- **MANDATORY**

I. Covered Medical Expenses should include:

- a. Hospital semi-private room and board (or room and board in an intensive care unit); Hospital ancillary services (including, but not limited to, use of the operating room or emergency room)
- b. Services of a Doctor or a registered nurse (R.N.)
- c. Ambulance service to or from a Hospital
- d. Laboratory tests
- e. Radiological procedures
- f. Anesthetics and their administration
- g. Blood, blood products, artificial blood products, and the transfusion thereof
- h. Physiotherapy
- i. Chiropractic expenses
- j. Medicines or drugs administered by a Doctor or that can be obtained only with a Doctor's written prescription
- k. Dental charges for Injury to sound, natural teeth
- l. Emergency medical treatment of pregnancy, including therapeutic termination of pregnancy

- m. Artificial limbs or eyes
 - n. Casts, splints, trusses, crutches, and braces
 - o. Oxygen or rental equipment for administration of oxygen
 - p. Rental of a wheelchair or hospital-type bed
 - q. Rental of mechanical equipment for treatment of respiratory paralysis
 - r. Mental and Nervous Disorders: means neurosis, psychoneurosis, psychopathy, psychosis, or mental or emotional disease or disorder of any kind
 - s. Pregnancy and childbirth
 - t. care or treatment of Acquired Immune Deficiency Syndrome (AIDS), AIDS Related Complex (ARC), or Human Immunodeficiency Virus (HIV) infection, or any illness or disease arising from these medical conditions
- II. Incurral Period: medical treatment is sought within this time frame
 - III. Dental Treatment: includes injury and alleviation of pain
 - IV. Emergency Medical: guarantee of payment to medical provider, hospital or treatment facility for charges that are medically necessary
 - V. Emergency Medical Evacuation: includes (1) expenses for transportation under medical supervision to another facility upon request by local attending Doctor, (2) travel expenses and medical services for a doctor or specialist, (3) expense to return a dependent child who is under 18 to principal residence and (4) expenses for family member or companion to accompany covered person to different facility.
 - VI. Repatriation of Remains: includes (1) expenses for embalming or cremation, (2) coffin or receptacle for transport, (3) transporting remains, and (4) expenses for family member or companion to accompany covered person to place of residence.
2. EMERGENCY REUNION - APPLIES TO BOTH THE FACULTY/STAFF POLICY AND STUDENT POLICY -- **MANDATORY**
- I. Expenses for a covered person's family member to accompany them to their home country or treatment facility, if the covered person has been hospitalized for at least 24 hours or the victim of a felonious assault to include kidnap or rape.
3. HOME COUNTRY EMERGENCY BENEFIT – APPLIES TO STUDENT POLICY ONLY -- **MANDATORY**
- I. Medical expenses for a covered person who continues treatment in their home country for an injury or sickness first treated during their covered trip.
4. HOME COUNTRY EXTENSION BENEFIT – APPLIES TO STUDENT POLICY ONLY -- **MANDATORY**
- I. Medical expenses for a covered person who obtains treatment for an injury or sickness during the Incurral Period once they are back in their Home Country
5. SECURITY EVACUATION - APPLIES TO BOTH THE FACULTY/STAFF POLICY AND STUDENT POLICY
- I. Covers: (1) transportation and related expenses to move a covered person to the nearest place of safety, (2) transportation expenses to covered persons home country, and (3) consulting services for missing or kidnapped person -- **MANDATORY**
 - II. Evacuations: includes evacuations for natural disasters and military or political issues. - **MANDATORY**
 - III. Acceptable Exclusions: -- **NON-MANDATORY**
 - a. Arising from actual fraudulent, dishonest or criminal act committed by covered person
 - b. Arising from violation of laws of the country covered person is traveling or country of residence
 - c. Failure to maintain travel documents and visas
 - d. Failure to cooperate with insurer with regards to evacuation
 - e. OFAC countries
 - f. Countries with previous US State Dept. or host country governmental authority advisory's. This does not apply to security evacuation by natural disaster.

D. ACCEPTABLE EXCLUSIONS - APPLIES TO BOTH THE FACULTY/STAFF POLICY AND STUDENT POLICY -- **MANDATORY**

1. POLICY EXCLUSIONS:

- I. intentionally self-inflicted injury; suicide or attempted suicide
- II. war or any act of war, whether declared or not
- III. a Covered Accident that occurs while a Covered Person is on active duty service in the military, naval or air force of any country or international organization
- IV. piloting or serving as a crewmember in any aircraft
- V. Injury or loss contributed to by the use of drugs unless administered by a Doctor
- VI. an accident if the Covered Person is the operator of a motor vehicle and does not possess a valid motor vehicle operator's license
- VII. travel in any Aircraft owned, leased or controlled by the Policyholder, or any of its subsidiaries or affiliates

2. MEDICAL EXCLUSIONS:

- I. routine physicals and care of any kind
- II. routine dental care and treatment
- III. routine nursery care
- IV. cosmetic surgery, except for reconstructive surgery needed as the result of an Injury
- V. eye refractions or eye examinations for the purpose of prescribing corrective lenses or for the fitting thereof; eyeglasses, contact lenses, and hearing aids
- VI. services, supplies, or treatment including any period of Hospital confinement which is not recommended, approved, and certified as Medically Necessary and reasonable by a Doctor, or expenses which are non-medical in nature
- VII. treatment by any Immediate Family Member or member of the Insured's household
- VIII. custodial care
- IX. elective treatment, exams or surgery; elective termination of pregnancy
- X. expenses payable by any automobile insurance policy without regard to fault
- XI. Injury sustained while participating in professional or semi-professional sports
- XII. sexually transmitted diseases or immune deficiency disorders and related conditions. This exclusion does not apply to the care or treatment of Acquired Immune Deficiency Syndrome (AIDS), AIDS Related Complex (ARC), or Human Immunodeficiency Virus (HIV) infection, or any illness or disease arising from these medical conditions

E. OTHER REQUIREMENTS - APPLIES TO BOTH THE FACULTY/STAFF POLICY AND STUDENT POLICY - **MANDATORY**

1. PRIMARY: Policy must be written to be primary above all other insurance, including health insurance and workers compensation insurance
2. COVERAGE PERIOD: August 21, 2015 at 12:00 a.m. to August 20, 2016 at 11:59 p.m.
3. COUNTRIES: All countries covered, with the exception listed under the Security Evacuation under Definitions
4. BLANKET: Policy must be written on a blanket basis so that all eligible persons are covered without additional endorsements, riders, etc. or registration.

F. TRAVEL DATA

1. UCF Faculty and Staff Travel Numbers

- I. 2012-2013
 - a. Annual Trips: 766
 - b. Annual Travel Days: 10,502
- II. Current Policy (August 21, 2014 – August 20, 2015)
 - a. Trip (5 month period 8/21/14 – 1/21/14): 266
 - b. Travel Days (5 month period 8/21/14 – 1/21/14): 3,135

2. UCF Student Travel Numbers
 - I. Estimated (May 2014 – May 2015)
 - a. Annual Trips: 60
 - b. Annual Travel Days: 22,120
 - II. Current Registered Travel (August 2014 – May 2015)
 - a. Trip: 22
 - b. Travel Days: 12,107

3. VUCF Travel Numbers
 - I. August 2012 – August 2013
 - a. Annual Trips: 1
 - b. Annual Travel Days: 77
 - II. August 2013 – August 2014
 - a. Annual Trips: 1
 - b. Annual Travel Days: 80
 - III. Estimated (August 2014 – August 2015)
 - a. Annual Trips: 1
 - b. Annual Travel Days: 70

4. FAU Faculty and Staff Travel Numbers
 - I. Estimated 2014-2015 (August 2014 – August 2015)
 - a. Annual Trips: 17
 - b. Annual Travel Days: 674

5. FAU Student Travel Numbers
 - I. Estimated 2014-2015 (August 2014 – August 2015)
 - a. Annual Trips: 127
 - b. Annual Travel Days: 16,638

6. USF Faculty and Staff Travel Numbers
 - I. 2012-2013 (Recorded/Estimate)
 - a. Annual Trips: 1,311/1,966
 - b. Annual Travel Days: 18,261/27,391
 - II. 2013-2014 (Recorded/Estimate)
 - a. Annual Trip: 1,249/1,873
 - b. Annual Travel Days: 17,757/26,635
 - III. 2014-2015 (Estimate)
 - a. Annual Trip: 2,153
 - b. Annual Travel Days: 30,630

7. USF Student Travel Numbers
 - I. 2012-2013
 - a. Annual Trips: 1,407
 - b. Annual Travel Days: 50,289
 - II. 2013-2014
 - a. Annual Trip: 1,649
 - b. Annual Travel Days: 62,043
 - III. 2014-2015 (Estimate)
 - a. Annual Trip: 1,896
 - b. Annual Travel Days: 71,349

G. PRIOR CLAIMS – NO POLICY PRIOR TO AUGUST 2014

1. UCF Claims Data
 - I. August 2014 – August 2015
 - a. Total Claims: 1
 - b. Total Paid: \$15,000

ATTACHMENT 1
Secure Handling of UCF Data

Secure protection and handling of data by vendors and third parties

1. Network Security. Vendor agrees at all times to maintain network security that – at a minimum – includes: network firewall provisioning, intrusion detection, and regular third party penetration testing. Likewise Vendor agrees to maintain network security that conforms to one of the following:
 - a. Those standards that UCF applies to its own network, as found at <http://www.cst.ucf.edu/about/information-security-office/iso-policies-standards/>
 - b. Current standards set forth and maintained by the National Institute of Standards and Technology, including those at: <http://web.nvd.nist.gov/view/ncp/repository>
 - c. Any generally recognized comparable standard (e.g., ISO/IEC 27001, etc.) that Vendor then applies to its own network.
2. Data Security. Vendor agrees to protect and maintain the security of UCF data based on the latest industry security standards and best practices. These security measures include, but are not limited to, maintaining secure segmented networks, maintaining systems that are up-to-date, and environments free of malware.
3. Data Transmission. Vendor agrees that any and all transmission or exchange of system application data with UCF and/or any other parties expressly designated by UCF – solely in accordance with Section 6 below – shall take place via secure means, e.g. HTTPS or FTPS with 128 bit key AES encryption or better.
4. Data Storage. Vendor agrees that any and all UCF data will be stored, processed, and maintained solely on designated target servers and that no UCF data at any time will be processed on or transferred to any portable or laptop computing device or any portable storage medium, unless that storage medium is in use as part of the Vendor's designated backup and recovery processes.
5. Data Encryption. Vendor agrees to store all UCF backup data as part of the its designated backup and recovery processes in encrypted form using 128 bit key AES encryption or better.
6. Data Re-Use. Vendor agrees that any and all data exchanged shall be used expressly and solely for the purposes enumerated in the Current Agreement. Data shall not be distributed, repurposed or shared across other applications, environments, or business units of Vendor.

Vendor further agrees that no UCF data of any kind shall be transmitted, exchanged or otherwise passed to other vendors or interested parties except on a case-by-case basis as specifically agreed to in writing by an agent of UCF.
7. End of Agreement Data Handling. Vendor agrees that upon termination of this Agreement it shall erase, destroy, and render unreadable all UCF data according to the standards enumerated in DOD 5220.22 or NIST 800-88 and certify in writing that these actions have been completed at a mutually predetermined date.
8. Data Breach. Vendor agrees to comply with all applicable laws that require the notification of individuals in the event of unauthorized release of personally-identifiable information or other event requiring notification. In the event of a breach of any of Vendor's security obligations or other event requiring notification under applicable law ("Notification Event"), Vendor agrees to assume responsibility for informing all such individuals in accordance with applicable law and to indemnify, hold harmless and defend UCF and its trustees, officers, and employees from and against any claims, damages, or other harm related to such Notification Event.

Related Documents:

- Third-Party Outsourcing (Cloud Computing) of University Data
- UCF Third Party Assurance Questionnaire
- 4-008 Data Classification and Protection

ATTACHMENT 2

BIDDER'S STATEMENT OF PRINCIPAL PLACE OF BUSINESS
(Must be completed & submitted with each competitive solicitation)

Name of Bidder: _____

Identify the state in which the Bidder has its principal place of business: _____

Proceed as follow: IF your principal place of business above is located within the State of Florida, the Bidder must sign below and attach to your solicitation. No further action is required. IF your principal place of business is outside of the State of Florida the following must be completed by an attorney and returned with your solicitation. Failure to comply shall be considered to be non-responsive to this solicitation.

OPINION OF OUT-OF-STATE BIDDER'S ATTORNEY ON BIDDING PREFERENCES

(To be completed by the Attorney for an Out-of-State Bidder)

NOTICE: Section 287.084(2), Fla. Stat., provides that "a vendor whose principal place of business is outside this state must accompany any written bid, proposal, or reply documents with a written opinion of an attorney at law licensed to practice law in that foreign state, as to the preferences, if any or none, granted by the law of that state [or political subdivision thereof] to its own business entities whose principal places of business are in that foreign state in the letting of any or all public contracts."

LEGAL OPINION ABOUT STATE BIDDING PREFERENCES

(Please Select One)

_____ The Bidder's principal place of business is in the State of _____ and it is my legal opinion that the laws of that state **do not grant a preference** in the letting of any or all public contracts to business entities whose principal places of business are in that state.

_____ The Bidder's principal place of business is in the State of _____ and it is my legal opinion that the laws of that state **grant the following preference(s)** in the letting of any or all public contracts to business entities whose principal places of business are in that state: [Please describe applicable preference(s) and identify applicable state law(s)]:

LEGAL OPINION ABOUT POLITICAL SUBDIVISION BIDDING PREFERENCES

(Please Select One)

_____ The Bidder's principal place of business is in the political subdivision of _____ and it is my legal opinion that the laws of that political subdivision **do not grant a preference** in the letting of any or all public contracts to business entities whose principal places of business are in that political subdivision.

_____ The Bidder's principal place of business is in the political subdivision of _____ and the laws of that political subdivision **grant the following preference(s)** in the letting of any or all public contracts to business entities whose principal places of business are in that political subdivision: [Please describe applicable preference(s) and identify applicable authority granting the preference(s)]:

Signature of out-of-state Bidder's attorney: _____

Printed name of out-of-state Bidder's attorney: _____

Address of out-of-state bidder's attorney: _____

Telephone Number of out-of-state bidder's attorney: (_____) _____ - _____

Email address of out-of-state bidder's attorney: _____

Attorney's states of bar admission: _____

Bidder's Printed Name: _____

Signature _____



Purchasing Department
12479 Research Parkway Bldg 600
Orlando, FL 32824
(407) 823-2661 Fax (407) 823-5551

IMPORTANT DOCUMENT – BID REVISION

BID NUMBER – ITB 1415 CCSA

OPENING DATE & TIME – April 28, 2015 @ 2:00 PM

INVITATION TO BID (ITB) -- Overseas Accident and Sickness Insurance for UCF Faculty/Staff and Students

ADDENDUM NUMBER: 1 ADDENDUM DATE: 4/13/2015

PLEASE MAKE THE FOLLOWING CHANGES AND/OR REVISIONS TO THE BID OR PROPOSAL DOCUMENTS.

Purpose of this addendum is to answer questions presented by perspective bidders/proposers:

See following page 2

PLEASE ACKNOWLEDGE RECEIPT OF THIS ADDENDUM AND RETURN IT WITH YOUR PROPOSAL. FAILURE TO SIGN AND RETURN WITH YOUR PROPOSAL COULD RESULT IN REJECTION OF YOUR PROPOSAL.

PROPOSERS SIGNATURE

PRINT OR TYPE PROPOSER'S NAME

COMPANY NAME

EMAIL ADDRESS

DATE

Questions for ITB 1415CCSA Overseas Accident and Sickness Insurance for Faculty/Staff and Students

Question 1 -- Can my firm (who is a broker/consultant) partner with an insurance carrier and submit as one entity/price? (The carrier would probably charge the same amount per unit/price with or without a broker-partner)

Answer: That's fine; however the insurance policies would be for each university separately.

Question 2 -- My firm has a Florida Life and Health license....Would I need any additional registrations in order to submit a bid?

Answer: You will need to contact the Florida Department of Financial Services, Division of Insurance Agent and Agency Services to determine if additional licenses are needed per Florida Statutes. Additionally, the insurance company you represent submitting the bid will need to be licensed in the State of Florida and carry the minimum ratings per page 12 of the ITB.

Question 3 -- on Page 12, titled "Bid Sheet" references Deposit Premium. Do you want one deposit premium combined for UCF, FAU, and USF? Is UCF the buyer for all 3 schools? Or do you want individual Deposit Premium amounts for UCF, FAU, and USF? We will provide a daily rate on the back end for audit purposes.

Answer: UCF is not the buyer for all three (3) schools; each school will work with the vendor with insurance policies and payments. Thus, deposit premiums will need to be separated by the university.

Question 4 -- Will FAU and USF be providing claims data for this current policy year? UCF lists total claims of \$15,000 but no information was provided for FAU or USF.

Answer:

FAU – does have any previous policy information

USF -- Renewal Premium/Loss Data:

YEAR	PREMIUM	PAID LOSSES	
2009	48,960	35,796	73%
2010	69,070	41,379	60%
2011	67,597	10,141	15%
2012	83,640	10,541	13%
2013	92,430	26,356	29%
Current	92,612	70,435	76%



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IMPORTANT DOCUMENT – BID REVISION

BID NUMBER – ITB 1415 CCSA

ORIGINAL OPENING DATE & TIME – April 28, 2015 @ 2:00 PM

NEW OPENING DATE & TIME – May 6, 2015 @ 2:00 PM

INVITATION TO BID (ITB) -- Overseas Accident and Sickness Insurance for UCF Faculty/Staff and Students

ADDENDUM NUMBER: 2 ADDENDUM DATE: 4/21/2015

PLEASE MAKE THE FOLLOWING CHANGES AND/OR REVISIONS TO THE BID OR PROPOSAL DOCUMENTS.

Purpose of this addendum is to:

- **Change bid opening date to May 6, 2015 @ 2:00 PM**
- **Add Florida State University Faculty/Staff and Student information**

See following page 2

PLEASE ACKNOWLEDGE RECEIPT OF THIS ADDENDUM AND RETURN IT WITH YOUR PROPOSAL. FAILURE TO SIGN AND RETURN WITH YOUR PROPOSAL COULD RESULT IN REJECTION OF YOUR PROPOSAL.

PROPOSERS SIGNATURE

PRINT OR TYPE PROPOSER'S NAME

COMPANY NAME

EMAIL ADDRESS

DATE

ADDITIONAL SCHOOL BEING ADDED TO THE ITB

FSU (Florida State University) information

Faculty & Staff (Annual Estimate)

- Faculty & Staff 400 members
- Travel Days 8750

Students (Annual Estimate)

- Students 2100
- Travel Days 107,000

*** No claims history is available at this time.



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IMPORTANT DOCUMENT – BID REVISION

BID NUMBER – ITB 1415 CCSA

ORIGINAL OPENING DATE & TIME – April 28, 2015 @ 2:00 PM

NEW REVISED OPENING DATE & TIME – May 27, 2015 @ 2:00 PM

INVITATION TO BID (ITB) -- Overseas Accident and Sickness Insurance for UCF Faculty/Staff and Students

ADDENDUM NUMBER: 4 ADDENDUM DATE: 5/12/2015

PLEASE MAKE THE FOLLOWING CHANGES AND/OR REVISIONS TO THE BID OR PROPOSAL DOCUMENTS.

Purpose of this addendum is to:

- **Add Florida Gulf Coast University -- Faculty/Staff and Student information**

PLEASE ACKNOWLEDGE RECEIPT OF THIS ADDENDUM AND RETURN IT WITH YOUR PROPOSAL. FAILURE TO SIGN AND RETURN WITH YOUR PROPOSAL COULD RESULT IN REJECTION OF YOUR PROPOSAL.

PROPOSERS SIGNATURE

PRINT OR TYPE PROPOSER'S NAME

COMPANY NAME

EMAIL ADDRESS

DATE

**ADDITIONAL SCHOOLS
BEING ADDED TO THE ITB**

Florida Gulf Coast University

Fiscal year to date – TARs is 2075

*** no other travel or staff information is available at this time



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IMPORTANT DOCUMENT – BID REVISION

BID NUMBER – ITB 1415 CCSA

ORIGINAL OPENING DATE & TIME – April 28, 2015 @ 2:00 PM

NEW REVISED OPENING DATE & TIME – May 27, 2015 @ 2:00 PM

INVITATION TO BID (ITB) -- Overseas Accident and Sickness Insurance for UCF Faculty/Staff and Students

ADDENDUM NUMBER: 3 ADDENDUM DATE: 4/24/2015

PLEASE MAKE THE FOLLOWING CHANGES AND/OR REVISIONS TO THE BID OR PROPOSAL DOCUMENTS.

Purpose of this addendum is to:

- **Change bid opening date to May 27, 2015 @ 2:00 PM**

We anticipate adding additional universities travel information by May 8, 2015

PLEASE ACKNOWLEDGE RECEIPT OF THIS ADDENDUM AND RETURN IT WITH YOUR PROPOSAL. FAILURE TO SIGN AND RETURN WITH YOUR PROPOSAL COULD RESULT IN REJECTION OF YOUR PROPOSAL.

PROPOSERS SIGNATURE

PRINT OR TYPE PROPOSER'S NAME

COMPANY NAME

EMAIL ADDRESS

DATE