

# **Pre-Proposal Conference**

## **WINDSTORM AND HAIL INSURANCE COVERAGE**



# **PURPOSE**

**The purpose of this meeting is to provide an overview of the requirements of the project and to answer any questions Proposers may have concerning this procurement.**

**The Corpus Christi Regional Transportation Authority (CCRTA) is requesting proposals for windstorm and hail insurance coverage for the listed properties and contents listed on Exhibit A. The CCRTA's current policy is set to expire on July 27, 2023.**

**This will be a firm-price one (1) year insurance contract.**

# Dates to Remember

Any questions or clarification needed after the pre-proposal meeting must be through an RFI submission to [procurement@ccrta.org](mailto:procurement@ccrta.org).

## **Request for Information/Exceptions/Approved Equals Request (Appendix F) Due Friday, May 26, 2023, at 3:00 p.m. (CST)**

- Please submit one form for each Request for Information/Approved Equals Request.

## **CCRTA's Response to Request for Information Due Friday, June 2, 2023**

- Responses will be posted as an addendum to the CCRTA's website at [www.ccrta.org/news-opportunities/business-with-us/](http://www.ccrta.org/news-opportunities/business-with-us/).

## **Proposals Due Friday, June 16, 2023 until 3:00 p.m. (CST)**

- Written proposals will be received at the offices of the Corpus Christi Regional Transportation Authority, hereinafter called the "CCRTA," at the Staples Street Center located at 602 N. Staples Street, Corpus Christi, Texas 78401, until 3:00 p.m. (CST) or emailed to [procurement@ccrta.org](mailto:procurement@ccrta.org) prior to deadline.

- Proposals will be valid for 60 calendar days from the Board approval date.
- It is the responsibility of the Proposer to ensure that the sealed proposal is delivered prior by the deadline.
- Proposals received after the deadline will not be accepted and will be returned to the Proposer unopened.

## **Proposal Opening Friday, June 16, 2023 at 3:30 p.m. (CST)**

- This will be held in the CCRTA's Boardroom at the Staples Street Center.
- To attend remotely, please submit a login request to [procurement@ccrta.org](mailto:procurement@ccrta.org) by 1:00 p.m. (CST) on this day.

# Dates to Remember

## **Best and Final Offers (BAFO) – Appointment of Agent of Record – TBD**

- The CCRTA will evaluate each proposal for completeness and responsiveness to its needs and may request Best and Final Offers from any or all proposing firms. The CCRTA may additionally appoint one agent as its agent of record to negotiate further with one or more insurance carriers and obtain a final coverage proposal.

## **Tentative Contract Award – Wednesday, July 12, 2023**

- CCRTA Board of Directors will meet to award a contract to the successful Proposer.

# APPLICABLE DOCUMENTS

For the purposes of this procurement, the following proposal documents are applicable:

- Request for Proposals,
  - Instructions to Proposers,
  - Special Instructions,
  - Coverage Specifications,
  - Proposal Response Form (Appendix A),
  - Certification Form (Appendix B),
  - Conflict of Interest Acknowledgement and Certification (Appendix C),
  - Acknowledgement of Addendum/Addenda (Appendix D),
  - References (Appendix E),
  - Request for Information Form (Appendix F), and
  - Bidder/Offeror/Proposer Information Sheet (Appendix G)
- 
- Exhibit A Schedule of Coverage Specification, and
  - Exhibit B Schedule of Loss Runs.

# REQUIRED DOCUMENTS

**DO NOT Alter Any Forms.**

**Doing so will deem your proposal as non-responsive.**

**Complete and sign the following forms and return with your signed proposal:**

- **Certification Form (Appendix B),**
- **Conflict of Interest Acknowledgement and Certification (C),**
- **Acknowledgement of Addendum/Addenda (Appendix D),**
- **References (Appendix E), and**
- **Bidder/Offeror/Proposer Information Sheet (Appendix G).**

**Reminders:**

**Acknowledge any addenda issued on the Acknowledgement of Addendum/Addenda Form (Appendix D)**

# REQUIRED DOCUMENTS

**The following documents must be signed and returned with your proposal in order for it to be considered responsive:**

**If mailing your proposal submission, please submit as follows:**

- Response to RFP **one (1) original and one (1) electronic version in PDF format supplied on a USB Flash Drive,**
- Proposal Response Form (Appendix A) along with the Carrier's Binder,
- Certification Form (Appendix B),
- Conflict of Interest Acknowledgement and Certification (C),
- Acknowledgement of Addendum/Addenda (Appendix D),
- References (Appendix E), and
- Bidder/Offeror/Proposer Information Sheet (Appendix G).

**For electronic proposal submissions to [procurement@ccrta.org](mailto:procurement@ccrta.org), please submit as follows:**

- Response to RFP,
- Proposal Response Form (Appendix A) along with the Carrier's Binder, and
- Appendices (B, C, D, E, and G).

**Proposer's email submission must be less than 30MB. If your email submission is more than 30MB, submit your proposal via a file storage service such as drop box, hightail, etc. If you choose to submit via a file storage service, send a link to [procurement@ccrta.org](mailto:procurement@ccrta.org) for the files to be accessed.**

# REQUIRED DOCUMENTS

**The following documents must be submitted prior to award if not submitted with Proposer's proposal:**

- Copy of Current License,
- Agent's Errors and Omissions Coverage, and
- A.M. Best Rating Certificate.

**The following document is required to be submitted ONLY upon notification of recommendation of award:**

- Form 1295 "Certificate of Interested Parties"



# INSTRUCTIONS TO PROPOSERS

## 1. GENERAL.

The following instructions by the CCRTA are intended to **afford proposers an equal opportunity to participate in the CCRTA's contracts.**

## 2. EXPLANATIONS.

Any explanation desired by a proposer regarding the meaning or interpretation of these Instructions or any other proposal documents **must be requested in writing** to the CCRTA with sufficient time allowed for a reply to reach proposers before the submission of their proposals. **Oral explanations or instructions will not be binding.** Any information given to a prospective proposer concerning a Request for Proposals will be furnished to all prospective proposers.

## 4. INFORMATION REQUIRED.

4.5. **Information submitted in response to this RFP will not be released by the CCRTA during the proposal evaluation process or prior to contract award. Proposers are advised that the CCRTA may be required to release proposal information, other than trade secrets, after contract award.**

# INSTRUCTIONS TO PROPOSERS

## 5. SUBMISSION OF PROPOSALS.

5.1. Sealed Proposals should be submitted in an envelope marked on the outside with the proposer's name and address and proposal description addressed to:

**Corpus Christi Regional Transportation Authority**

**Staples Street Center**

**ATTN: Procurement Department**

**602 N. Staples Street**

**Corpus Christi, Texas 78401**

**Proposal For: RFP No. 2023-I-10 Windstorm and Hail Insurance Coverage**

**Proposal Due Date: June 16, 2023 by 3:00 p.m. (CST)**

5.2. **Proposals must be submitted in sufficient time to be received and time-stamped at the above location on or before the published proposal date and time shown on the Request for Proposals. Proposals received after the published time and date cannot be considered. Any proposals which are mislabeled or do not indicate the proposer's name or address as required above may be opened by the CCRTA solely for the purpose of identifying the proposer for return of the proposal.**

# INSTRUCTIONS TO PROPOSERS

## 6. MODIFICATION OR WITHDRAWAL OF PROPOSALS.

**Proposals may be modified or withdrawn by written or email notice received by the CCRTA prior to the exact hour and date specified for receipt of proposals.**

## 7. OPENING PROPOSALS.

**All proposals shall be opened by the CCRTA as soon after the proposal deadline as is reasonably practicable. Proposers are welcome to attend the Proposal Opening on the second floor of the CCRTA's Staples Street Center located at 602 N. Staples Street, Corpus Christi, TX 78401. To attend the Proposal Opening virtually, please submit a login request to [procurement@ccrta.org](mailto:procurement@ccrta.org) by 1:00 p.m. (CST) Friday, June 16, 2023. Only the names of the Proposing Firms that submitted proposals will be announced.**

## 8. EVALUATION FACTORS.

**8.1. The CCRTA will award a contract based upon the criteria set forth in the Request for Proposals.**

**8.2. Proposals will be considered only from firms that are regularly engaged and licensed in the business of providing the goods and/or services described in the Request for Proposals for a reasonable period of time; and have sufficient financial support, equipment, and organization to ensure that they can satisfactorily execute the services if awarded a Contract under the terms and conditions herein stated.**

# INSTRUCTIONS TO PROPOSERS

## 10. RESERVATION OF RIGHTS.

The CCRTA expressly reserves the right to:

10.1. Reject or cancel any or all proposals;

10.2. Waive any defect, irregularity or informality in any proposal or proposal procedure;

10.3. Waive as an informality, minor deviations from specifications at a lower price than other proposals meeting all aspects of the specifications if it is determined that total cost is lower and the overall function is improved or not impaired;

10.4. Extend the proposal due date;

10.5. Reissue a Request for Proposals;

10.6. Procure any item or services by other means;

10.7. The CCRTA reserves the right to retain all proposals submitted. The selection or rejection of a proposal does not affect this right; and

10.8. The CCRTA reserves the right to negotiate a Contract with the proposer having the best evaluation as determined by the CCRTA. No award will be made automatically based upon the lowest price or based solely on the proposal submitted. The CCRTA additionally reserved the right to suspend negotiations with the first proposer should it not progress in a manner satisfactory to the CCRTA and commence negotiations with the next best rated proposer.

# INSTRUCTIONS TO PROPOSERS

## 12. PROTESTS.

In the event that a proposer desires to protest any procedure, **the proposer should present such protest, in writing, to the CCRTA's Chief Executive Officer within five (5) business days following the Board approval date.** The protest shall state the name and address of the protestor, refer to the project number and description of the Request for Proposals, and contain a statement of the grounds for protest and any supporting documentation.

## 16. NO DIRECT CONTACT WITH CCRTA BOARD MEMBERS.

Proposers are advised not to contact any Board members of the CCRTA directly in any manner during this proposal process. All communications directly with the Board should be reserved for public meetings in which this item is properly posted on the agenda. All communication regarding this RFP must be made through the Procurement Department.

# Common Vendor Errors in Proposal Submittals:

- Forgetting to sign the proposal
- Taking exceptions to the solicitation
- Failure to acknowledge receipt of addenda's
- Including promotional/extraneous information which services to alter the solicitation requirements
- Failure to return all required forms
- Late delivery of the proposal



Thank You  
For Your  
Attendance!