



**REQUEST FOR PROPOSALS
For
WINDSTORM AND HAIL INSURANCE COVERAGE**

RFP NO.: 2023-I-10

Date Issued: May 5, 2023

Proposals will be received at the offices of the Corpus Christi Regional Transportation Authority, hereinafter called the "CCRTA", at 602 N. Staples Street, Corpus Christi, Texas 78401 or by email at procurement@ccrta.org until 3:00 p.m. (CST) Friday, June 16, 2023 for Windstorm and Hail Insurance Coverage. This is a firm-price one (1) year insurance contract. Proposals will be valid for sixty (60) calendar days from the Board approval date.

PROPOSERS are encouraged to attend a pre-proposal conference scheduled for 3:00 p.m. (CST), Friday, May 19, 2023 at the Staples Street Center located at 602 N. Staples Street, Corpus Christi, Texas 78401. The purpose of this meeting is to provide an overview of the requirements of the insurance and to answer any questions PROPOSERS may have concerning this procurement. Although attendance is not mandatory, it is highly recommended.

If you are unable to attend the pre-proposal conference, but would like to remotely participate please send a request for login information to procurement@ccrta.org by 1:00 p.m. (CST) Friday, May 19, 2023.

Requests for Information/Exceptions/Approved Equals Request will be due to procurement@ccrta.org by 3:00 p.m. (CST), Friday, May 26, 2023, with a response from the CCRTA by Friday, June 2, 2023.

Copies of this Request for Proposals (RFP) and information may be obtained from the CCRTA's website at www.ccrta.org/news-opportunities/business-with-us/. Further information may be obtained from Sherrié Clay, Procurement Specialist, or Christina Perez, Director of Procurement, at procurement@ccrta.org or (361) 289-2712.

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.

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

For mailed proposal submissions, 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 (Appendix C),
- Acknowledgement of Addendum/Addenda (Appendix D),
- References (Appendix E), and
- Bidder/Offeror/Proposer Information Sheet (Appendix G).

For electronic proposal submissions, please submit by email to procurement@ccrta.org as follows in one electronic file:

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

Note: 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 for the files to be accessed.

Proposers are to choose one submission option. If submitting by mail, **DO NOT** submit electronically. If submitting electronically, **DO NOT** submit by mail.

Failure to provide this information may deem your firm to be non-responsive.

The following documents must be submitted prior to award if not submitted with the 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 for award:

- Form 1295 "Certificate of Interested Parties"

Proposers are encouraged to utilize the enclosed Proposal Submission Checklist to ensure your proposal package is responsive to the requirements of this RFP.

- Proposal Submission Checklist

PROPOSAL SUBMISSION CHECKLIST

(USE AS A REFERENCE)

Proposal Submission Checklist	Check
Proposals MUST BE submitted in the following format:	
1. Cover Letter	
2. Proposal Response Form (Appendix A)	
3. Appendices B, C, D, E, and G	
3.1 Certification Form (Appendix B)	
3.2 Conflict of Interest Acknowledgement and Certification (Appendix C)	
3.3 Acknowledgement of Addendum/Addenda (Appendix D)	
3.4 References (Appendix E)	
3.5 Bidder/Offeror/Proposer Information Sheet (Appendix G)	
Proposals MUST include the following:	
If submitting my mail:	
- One Original Proposal (Items 1 – 3.5 (listed above), along with the Carrier’s Binder	
- Five hard copies of Proposal	
- One Electronic copy on a USB Flash Drive	
Electronic Submission of Proposal: Submit by email to procurement@ccrta.org.	
Include the following in one electronic file:	
• Proposal Response Form (Appendix A) along with the Carrier’s Binder,	
• Submit all Appendices (B, C, D, E, and G)	
Proposal Response Form (Appendix A)	
Proposer must:	
I. General Information	
1. List the Proposer’s Name, Address, Primary Business, Type of Company, and Year started in business	
2. Sign, Print, Date, Title, Proposer’s Company, Address, Phone, Fax No., and Email	
II. Property and Contents Coverage – Windstorm and Hail Insurance	
1. A. Complete the Property and Contents Coverage	
1. List Carrier	
2. Submit Carrier’s Binder	
2. B. Answer questions	
III. Insurance Agency Questionnaire	
- Answer Questions A - K	
Appendices	
3.1 Certification Form (Appendix B) – Sign, Print, list Title and Date	
3.2 Conflict of Interest Acknowledgement and Certification (Appendix C)	

- Sign, list Title, Print, and Date	
3.3 Acknowledgement of Addendum/Addenda (Appendix D)	
- List Firm Name and write in each addendum issued (<i>i.e. Addenda No. 1, 2, and 3</i>) - Sign, Print Name and Title, and Date	
3.4 References (Appendix E) DO NOT Include CCRTA As A Reference	
- The Proposer must:	
1. List 4 similar projects which he/she has completed within the last five years.	
2. Provide a list of contracts that the firm currently has in process.	
3.5 Bidder/Offeror/Proposer Information Sheet (Appendix G)	
I. Bidder/Offeror/Proposer	
- List Company Name, Address, City, State, Zip Code, FEIN/TIN and Unique Identity number - List if the Company is a subsidiary. If yes, name the Holding/Parent Company - List the number of years the Company has been in business - List the Company's Commodity/NAICS Code and Corresponding Index Entry	
II. Disadvantaged Business Enterprise (DBE) Certification	
- If you are currently certified as a DBE, list the year of initial certification and the name of the agency with whom you are certified.	
III. Bidder/Offeror/Proposer Primary Contact	
- List Name, Title, Telephone numbers (office and mobile), and a valid email address	
IV. Authorized Signatory (If different from Primary Contact)	
- List Name, Title, Telephone numbers (office and mobile), and a valid email address	

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 as an amendment to the request if such information is necessary to proposers in submitting proposals on the request or if the lack of such information would be prejudicial to uninformed proposers.

3. SPECIFICATIONS.

3.1 Proposers are expected to examine the specifications, standard provisions, and all instructions. Failure to do so will be at the proposer's risk. Proposals that are submitted on other than authorized forms or with different terms or provisions may not be considered as responsive proposals.

3.2 The apparent silence of the specifications as to any detail, or the apparent omission from it of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practice is to prevail and that only material and workmanship of the finest quality are to be used. All interpretations of the specifications shall be made on the basis of this statement.

4. INFORMATION REQUIRED.

4.1. Each proposer shall furnish the information required by the Request for Proposals. The proposer shall sign the Price Proposal and the proposal, which collectively shall constitute the proposer's offer. Erasures or other changes must be initialed by the person signing the documents. Proposals signed by an agent are to be accompanied by evidence of his authority unless such evidence has been previously furnished to the CCRTA.

4.2. All prices shall be entered on the Price Proposal in ink or be typewritten.

4.3. Only signed, written proposals specifically accepting responsibility for meeting the objectives and requirements specified in the Request for Proposals will be considered.

The cover letter must bear the signature of a person duly authorized to legally commit for the proposer. All costs of proposal preparation will be borne by the proposer.

- 4.4. The CCRTA does not have to pay federal excise taxes or state and local sales and use taxes, except for contracts for improvements to real property.
- 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.

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: Friday, June 16, 2023 by 3:00 p.m. (CST)

If hand delivery is preferred, please deliver to the CCRTA's receptionist located on the third floor at the above location to be time and date stamped.

For electronic submissions of your proposal, please email your proposal to procurement@ccrta.org before the proposal submission deadline.

- 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.

5.3. **Schedule**

Proposals shall be governed by the following schedule:

- **May 5, 2023 - RFP Issued**
Proposal documents are available on the CCRTA's website at: www.ccrta.org/news-opportunities/business-with-us/.
- **May 19, 2023 - Pre-Proposal Conference** at 3:00 p.m. (CST) on the second floor in the Boardroom located at the CCRTA's Staples Street Center at 602 N. Staples Street, Corpus Christi, Texas 78401. To remotely attend, please send a request

for login information to procurement@ccrta.org by 1:00 p.m. (CST) Friday, May 19, 2023.

- **May 26, 2023 - Request for Information/Exceptions/Approved Equals Request Due**
Written Requests for Information/Exceptions/Approved Equals Request (Appendix F) are due by 3:00 p.m. (CST). Please submit **one** form for **each** Request for Information/Exceptions/Approved Equals Request which must be emailed to procurement@ccrta.org or received via mail at the CCRTA's Staples Street Center, Attn: Procurement Department, at 602 N. Staples Street, Corpus Christi, Texas 78401.
- **June 2, 2023 – CCRTA’s Response to Request for Information/Exceptions/ Approved Equals Request Due**
Responses will be posted as an addendum to the CCRTA’s website at www.ccrta.org/news-opportunities/business-with-us/.
- **June 16, 2023 - Proposals Due**
Written proposals are due no later than 3:00 p.m. (CST). All proposals must be received at the CCRTA's Staples Street Center located at 602 N. Staples Street, Corpus Christi, Texas 78401 or emailed to procurement@ccrta.org prior to the deadline.
- **June 16, 2023 – Proposal Opening**
The Proposal Opening will be held at 3:30 p.m. (CST) on Friday, June 16, 2023 in the CCRTA’s Boardroom located on the second floor of the Staples Street Center at 602 N. Staples St., Corpus Christi, Texas 78401. To attend the Proposal Opening remotely, please submit a login request to procurement@ccrta.org by 1:00 p.m. (CST) Friday, June 16, 2023.
- **Best and Final Offer – 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**
The CCRTA Board of Directors will meet to award a contract to the successful Proposer.

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. A proposal may also be withdrawn in person by a proposer or an authorized representative prior to the proposal deadline; provided the proposer's identity is made known and he or she signs a receipt for the proposal.

7. OPENING PROPOSALS.

All proposals shall be opened by the CCRTA as soon after the proposal deadline as is reasonably practicable. Information submitted in response to the Request for Proposals shall 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.

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 by 1:00 p.m. (CST) Friday, June 16, 2023. Only the names of the Proposing Firms that submitted proposals will be announced. Price Proposals will not be opened.

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 insurance coverages 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 provide the insurance coverage if awarded a Contract under the terms and conditions herein stated. The successful organization must be a well-established company in line with the best business practices in the industry as determined by the CCRTA. In making the award, the CCRTA may consider any evidence available to it of the financial, technical, and other qualifications and abilities of a proposer, including past performance (experience) with the CCRTA and other similar customers. A record of nonperformance or poor performance may disqualify a proposer from award.

9. ELIGIBILITY FOR AWARD.

9.1. In order for a proposer to be eligible for award of the Contract, the proposal must be responsive to the Request for Proposals; and the CCRTA must be able to determine that the proposer is responsible to perform the Contract satisfactorily.

- 9.2. Responsive proposals are those complying with all material aspects of the Request for Proposals. Proposals which do not comply with all the terms and conditions of the Request for Proposals will be rejected as non-responsive.
- 9.3. Responsible proposers at a minimum must:
 - 9.3.1 Have adequate financial resources or the ability to obtain such resources as required during the performance of the Contract;
 - 9.3.2 Have a satisfactory record of past performance;
 - 9.3.3. Have necessary management and technical capability to perform;
 - 9.3.4. Be qualified as an established firm regularly engaged in the type of business to perform the Contract required by this Request for Proposals;
 - 9.3.5 Be otherwise qualified and eligible to receive an award under applicable federal, state, county, or municipal laws and regulations; and
 - 9.3.6 Certify that it is not on the U.S. Comptroller General's list of ineligible contractors – signing and submitting the proposal is so certifying. (NOTE: This requirement is only applicable to federally-funded contracts.)
- 9.4. A proposer may be requested to submit written evidence verifying that it meets the minimum criteria necessary to be determined a responsible proposer. Refusal to provide requested information shall result in the proposer being declared not responsible, and the proposal shall be rejected.

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.

11. ACCEPTANCE.

Acceptance of a proposer's offer will be by acceptance letters issued by the CCRTA. Subsequent purchase orders and release orders may be issued as appropriate. Unless the proposer specifies otherwise in the proposal, the CCRTA may award the contract for any item or group of items shown on the Request for Proposals.

12. PROTESTS.

In the event that a proposer desires to protest any procedure, the proposer should present such protest, in writing, to the CCRTA Chief Executive Officer within five (5) business days following board approval of an award. 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. For federally-assisted contracts, certain additional protest procedures apply and may be found in the Supplemental Conditions contained within the Request for Proposals.

13. EQUAL OPPORTUNITY.

Proposers are expected to comply with the Affirmative Action Programs of the CCRTA with respect to its provisions concerning contractors.

14. SINGLE PROPOSAL.

14.1. In the event a single proposal is received, the CCRTA will, at its option, either conduct a price and/or cost analysis of the proposal and make the award by negotiation or reject the proposal and revise the Request for Proposals. A price analysis is the process of examining the proposal and evaluating a prospective price without evaluating the separate cost elements. Price analysis shall be performed by comparison of the price quotations, with published price lists, or other established or competitive prices. The comparison shall be made to a purchase of similar quantity and involving similar specifications. Where a difference exists, a detailed analysis must be made of this difference and costs attached thereto.

14.2. Where it is impossible to obtain a valid price analysis, it may be necessary for the CCRTA to conduct a cost analysis of the proposal price. Cost analysis is the review and evaluation of a proposer's cost or pricing data and of the factors applied in projecting from such data the estimated costs of performing the contract, assuming reasonable economy and efficiency.

14.3. The price and/or cost analysis shall be made by personnel of the CCRTA's selection. The CCRTA's discretion exercised as to its options in this regard shall be final.

15. FORM 1295 "CERTIFICATE OF INTERESTED PARTIES"

(Only required to be submitted upon notification of recommendation for award.)

Proposers must comply with Government Code Section 2252.908 and submit Form 1295 "Certificate of Interested Parties" upon notification that Proposer has been recommended for award. Form 1295 requires disclosure of "interested parties" with respect to entities that enter contracts with cities. These interested parties include:

(1) persons with a "controlling interest" in the entity, which includes: a. an ownership interest or participating interest in a business entity by virtue of units, percentage, shares, stock or otherwise that exceeds 10 percent; b. membership on the board of directors or other governing body of a business entity of which the board or other governing body is composed of not more than 10 members; or c. service as an officer of a business entity that has four or fewer officers, or service as one of the four officers most highly compensated by a business entity that has more than four officers; or

(2) a person who acts as an intermediary and who actively participates in facilitating a contract or negotiating the contract with a governmental entity or state agency, including a broker, adviser, attorney or representative of or agent for the business entity who has a controlling interest or intermediary for the business entity.

Form 1295 must be electronically filed with the Texas Ethics Commission at https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm. The form must then be printed, signed, and filed with the CCRTA. For more information, please review the Texas Ethics Commission Rules at <https://www.ethics.state.tx.us/legal/ch46.html>.

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.

SPECIAL INSTRUCTIONS

1.0 GENERAL

1.1 Introduction

The Corpus Christi Regional Transportation Authority (CCRTA) is requesting competitive proposals for Windstorm and Hail Insurance Coverage for the listed property and contents listed on Exhibit A. The CCRTA's current policy is set to expire on July 27, 2023.

Proposers, which have relevant experience, are invited to complete and submit proposals. To enhance comparability, proposal elements must be addressed in the informational sequence noted below:

- Cover Letter,
- Proposal Response Form (Appendix A), and
- Appendices B, C, D, E, and G

All proposals must be submitted before the deadline in the solicitation and addressed with the information as noted in Section 5 "Submission of Proposals" of the "Instructions to Proposers". The proposal contents shall include the following:

1.2 Proposal Contents and Format

The contents of the proposal shall include the following:

Cover Letter

Include appropriate introductory and contact information, including the name of the firm's principal liaison.

Section 1 – Insurance Coverages and Experience

The proposer must submit the Proposal Response Form (Appendix A) with its proposal. All costs to be incurred and billed to the CCRTA will be firm and included in this Proposal Response Form (Appendix A). **(Failure to complete and return this section will be cause for rejection of this proposal as non-responsive.)** List the Carrier on the Proposal Response Form (Appendix A), and include the Carrier's Binder with your Proposal Response Form. Appendix A includes required information concerning the experience of the Proposer and the key personnel who will handle this account. Proposers may submit additional information concerning their firm as warranted.

Section 2 – Qualifications and References

Proposer must detail qualifications of firm in performing this type of work and provide

references using (Appendix E).

Proposer must also provide a copy of current license and Errors and Omissions Certificate.

Section 3 – Certification Forms (Appendices B, C, D, E, and G)

2.0 PROPOSAL EVALUATION

An evaluation committee will privately evaluate all responsive proposals based upon the evaluation criteria, and their respective weighted importance, specified in Section 2.1, Evaluation Criteria. This allows the CCRTA to analyze proposals on an equal basis and affords all proposers the opportunity to know the basis upon which their proposals will be evaluated. Those proposals furnished complete with all required documentation will be evaluated. Those proposals found incomplete or failing to address the needs of the CCRTA, as stated herein, will not be evaluated.

An award, if any, will be made based upon the insurance coverage that is deemed most advantageous to, and in the best interest of the CCRTA and the general public; cost and other factors considered, after evaluation in accordance with the evaluation criteria.

2.1 Evaluation Criteria

Section	Evaluation Criteria	Weight (Points)
1	Cost	80
2	Experiences, Qualifications and References	20
Total		100

Evaluation points for cost will be assigned based on a lowest cost (most points) to highest cost (least points) ranking of proposed cost packages. The maximum points available for cost are **80 points**.

2.2 Best and Final Offer (BAFO)

After review of the proposals, the CCRTA shall determine whether acceptance of the most favorable initial proposal(s) without proposer discussion is appropriate, or whether discussions and/or negotiations should be conducted with one or more proposers. The CCRTA reserves the right to make minor changes to the RFP during BAFO negotiations. All proposers shall be notified of any changes in order to prepare their BAFO.

If the CCRTA elects to enter into discussions with one or more proposers, the proposer(s) may be requested to submit a BAFO at the conclusion of discussions and/or negotiations. Any changes to the proposer's initial proposal, including any

issues addressed in discussions, must be submitted in writing in a BAFO in order to be considered. If the proposer fails to submit a BAFO at the conclusion of discussions and/or negotiations, the CCRTA will consider the original submitted Price Proposal as its BAFO.

Following an independent and final evaluation of the BAFO proposals submitted utilizing the evaluation criteria in Section 2.1, the evaluation committee will make a recommendation for award of Contract. Scores from the first phase of the evaluation have no bearing on the final BAFO evaluation, and the recommendation for award will be based solely on the scores from the BAFO evaluation.

2.3 Appointment of Agent of Record

The CCRTA additionally reserves the right to appoint one of the agents submitting a proposal as its agent of record to negotiate further with one or more insurance carriers and obtain a final coverage proposal. In the event of such selection, the recommendation for award will be based on the final negotiated costs of coverage obtained.

COVERAGE SPECIFICATIONS

1.0 DESCRIPTION

The Corpus Christi Regional Transportation Authority (CCRTA) is requesting competitive proposals for Windstorm and Hail Insurance Coverage for the listed property and contents listed on Exhibit A.

2.0 PROPERTY and CONTENTS

2.1 Property covered: See attached Exhibit A.

2.2 Coverage on buildings, contents, business income, and auxiliary structures at all locations including on-site improvements.

2.3 Basis of Recovery: Full Replacement Cost.

2.4 Deductibles (Per Occurrence):

Option 1: 1% of the Sum of the State Values for each building (Affected by Loss) identified in Exhibit A subject to \$25,000 minimum per occurrence –
Named Storm Wind/Hail
\$25,000 Per Occurrence - All Other Wind/Hail Storms

Option 2: Competitive Alternative Options submitted by the proposer will be reviewed and considered.

2.5 Valuation Basis: Replacement Cost as respects Property Damage Actual Loss Sustained as respects Time Element

2.6 One Year Rate Guarantee.

3.0 LOSS RUNS

3.1 See attached Schedules of Loss Runs (Exhibit B) over the last five years.

4.0 QUALIFICATIONS

4.1 Carrier must be rated B+ or better by the most current issuance of A.M. Best. The Carrier additionally must be qualified to do business in the State of Texas.

4.2 AGENT

All agents submitting proposals for this insurance must meet the following minimum qualifications:

a. The agent or broker must be duly licensed to do business in the State of Texas.

- b. The agency must have insurance for agent's errors and omissions with a limit of at least \$1,000,000 per occurrence and \$2,000,000 aggregate. **A certificate evidencing coverage must be included in the proposal.**
- c. The agency must have been in business for at least five (5) years.
- d. The agency must assign a minimum of one qualified account representative to service the CCRTA. This representative should have a minimum of five (5) years of experience in commercial property/casualty insurance and / or hold an insurance designation. Please include the resumes of all proposed account representatives in the proposal.

5.0 TERMS AND CONDITIONS

- 5.1** No flat cancellations.
- 5.2** Ninety (90) day notice of cancellations, except 10 days for nonpayment of premium or material misstatement; subject to individual state requirements.
- 5.3** Nonpayment of premium(s) is considered insured's request to cancel – requested cancellations are subject to short-rate calculations and severe penalties.
- 5.4** Any additions and/or return premium(s) under \$500 shall be waived by the underwriter.
- 5.5** Percent deductibles are per occurrence, per building.
- 5.6** Business income coverage is blanket across location.

CERTIFICATION FORMS

Do NOT Alter Any Forms.

Doing so will deem your proposal as non-responsive.

Complete and sign the following forms and return.

- Certification Form (Appendix B),
- Conflict of Interest Acknowledgement and Certification (Appendix 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).

EXHIBIT A

**SCHEDULE OF
COVERAGES SPECIFICATION**

**EXHIBIT A
SCHEDULE OF COVERAGE SPECIFICATION**

Corpus Christi Regional Transportation Authority
2022-2023

CCRTA Assets to be Covered for Windstorm and Hail

Item No.	Street Address	City	State Code	Zip	ISO Construction	Construction Description	Building Description	Year Built	Real Property Value	Personal Property Value	Business Income	Total TIV	Square Footage	ISO Protection Class
1	5658 Bear Ln	Corpus Christi	TX	78405	3	NC	Maintenance Building/Tire Shop/Bus Lifts	1996	\$4,004,134	\$1,000,000		\$5,004,134	45,634	3
2	5657D G Bear Ln	Corpus Christi	TX	78405	4	MNC	Wash Rack/Bus Lift	1996	\$261,529	\$200,000		\$461,529	2,320	3
3	5658 E Bear Ln	Corpus Christi	TX	78405	3	NC	Fueling Island Canopy & 12 Pumps	1993	\$356,299	\$990,777		\$1,347,076	7,752	3
4	5314 McArdle Rd	Corpus Christi	TX	78411	4	MNC	Southside Station Storage/Restroom	2003	\$117,866	\$200,000		\$317,866	350	3
5	5314 McArdle Rd	Corpus Christi	TX	78411	4	MNC	Southside Station Shelter A	2003	\$343,643			\$343,643	2,604	3
6	5314 McArdle Rd	Corpus Christi	TX	78411	4	MNC	Southside Station Shelter B	2003	\$343,643			\$343,643	2,604	3
7	5658 Bear Ln	Corpus Christi	TX	78405	3	NC	CNG Fueling Station Bldg (includes Tanks & Equip)	2012	\$2,468,722			\$2,468,722	2,812	3
8	5658 Bear Ln	Corpus Christi	TX	78405	4	MNC	Switch Gear & Electrical Bldg w/installed Equip	2012	\$518,500			\$518,500	50	3
9	401 Avenue A	Corpus Christi	TX	78404	2	JM	Robstown Transfer Station	2015	\$700,000	\$25,000		\$725,000	608	3
10	5658 Bear Ln	Corpus Christi	TX	78405	4	MNC	Operations Facility	2002	\$4,363,373	\$1,500,000		\$5,863,373	25,236	3
11	602 B N Staples	Corpus Christi	TX	78404	2	JM	Staples Street Transfer Station	2016	\$1,606,304	\$190,000		\$1,796,304		3
12	602A N Staples Street	Corpus Christi	TX	78404	4	MNC	Staples Street Center	2016	\$23,000,000	\$1,051,000		\$24,051,000	79,254	3
13	5658 Bear Ln	Corpus Christi	TX	78405			Generator		\$205,000			\$205,000		3
14	4311 Ayers St	Corpus Christi	TX	78405	2	JM	Port/Ayers Station - Shelter #1	1995	\$517,117	\$20,000		\$537,117	15,000	3
15	4311C Ayers St	Corpus Christi	TX	78405	2	JM	Port/Ayers Station - Shelter #2	1995	\$517,117	\$20,000		\$537,117	15,000	3
16	4311D Ayers St	Corpus Christi	TX	78405	2	JM	Port/Ayers Station - Arch	1995	\$39,858	\$13,666		\$53,524	182	3
17	Islander Way	Corpus Christi	TX	78411	2	JM	TX A&M Bus Stop Shelter (2)	2015	\$275,767	\$10,000		\$285,767	432	3
		Corpus Christi	TX				Business Interruption				\$250,000	\$250,000		3
18	2606 Hospital Blvd	Corpus Christi	TX	78405			Hector P. Garcia Clinic -Bus Stop Shelter and Digital Monitor	2020	39,000	7000		\$46,000	300	3
TOTAL									\$39,677,872	\$5,227,443	\$250,000	\$45,155,315		

EXHIBIT B

SCHEDULE OF LOSS RUNS



Ventus Risk Management, Inc.
PO Box 25004
Columbia, SC 29224

Historical Loss Run as of March 28, 2023

Insured: Corpus Christi Regional Transportation Authority
Line of Business: Commercial Property
Policy Number: VETPF00986220
Policy Period: 07-28-2022 to 07-28-2023

No claims have been reported for this policy period.

Insured: Corpus Christi Regional Transportation Authority
Line of Business: Commercial Property
Policy Number: VETGF00986210
Policy Period: 07-28-2021 to 07-28-2022

No claims have been reported for this policy period.

Insured: Corpus Christi Regional Transportation Authority
Line of Business: Commercial Property
Policy Number: VETGF00986200
Policy Period: 07-28-2020 to 07-28-2021

No claims have been reported for this policy period.

Insured: Corpus Christi Regional Transportation Authority
Line of Business: Commercial Property
Policy Number: VETGF00986190
Policy Period: 07-28-2019 to 07-28-2020

No claims have been reported for this policy period.

Insured: Corpus Christi Regional Transportation Authority
Line of Business: Commercial Property
Policy Number: VETGF00986180
Policy Period: 07-28-2018 to 07-28-2019

No claims have been reported for this policy period.

APPENDIX A

PROPOSAL RESPONSE FORM

I. General Information

Name of your company: _____

Address: _____

Primary Business: _____

Type of Company:
(Corp., Partnership, etc.): _____

Year started in business: _____

The Proposer, in compliance with the Request for Proposals on property/casualty coverage, having examined the specifications and being familiar with all conditions in the specifications, hereby proposes to provide the coverages in accordance with the proposal documents on the attached response sheets.

“The undersigned affirms that they are duly authorized to execute this contract, that this company, corporation, firm, partnership or individual has not prepared this proposal in collusion with any other Proposer, and that the contents of this proposal as to prices, terms or conditions of said proposal have not been communicated by the undersigned nor by an employee or agent to any other person engaged in this type of business prior to the official opening of this proposal.”

Having reviewed the coverage specifications, we have complied with all requirements and conditions

Signature: _____ Date: _____

Printed Name: _____ Title: _____

Proposers Company: _____

Address: _____ Phone: _____

Fax No.: _____ E-Mail: _____

II. Property and Contents Coverage – Windstorm and Hail Insurance

A. Property and Contents Coverage (see Exhibit A)

Option	Description	Total Price
Option 1	Deductible: 1% of the Sum of the Stated Values for each building (affected by loss) identified in the State of Values subject to \$25,000 minimum per occurrence – Named Storm Wind/Hail \$25,000 per Occurrence – All Other Wind/Hail Storms	
Option 2	Proposer’s Competitive Alternative Option	

1. List the Carrier below:

2. Include Carrier’s Binder

***** PROPOSERS must complete all information requested -- NO ITEMS MAY REMAIN BLANK (use N/A or other as necessary). *****

B. Please answer these questions:

1. Is this proposal providing windstorm and hail? Yes___ No ___
2. Is there a co-insurance clause applicable to property coverage? Yes ___ No ___
3. Is the basis of recovery replacement cost new, both on building and contents? Yes___ No ___
4. Is newly acquired or constructed property covered? Yes ___ No___
Limit: _____
5. Does the policy include demolition cost? Yes ___ No___
Limit: _____
6. Does the proposal include a debris removal clause? Yes___ No___
Limit: _____

3. Please answer the following questions (Insurance Agency Questionnaire)

A. Who will have primary responsibility for CCRTA's account? _____

1. Number of years in the insurance business: _____

2. Insurance background: _____

3. Educational background: _____

4. Number of other public entities serviced: _____

B. Who will be the backup person for CCRTA's account? _____

1. Number of years in the insurance business: _____

2. Insurance background: _____

3. Educational background: _____

4. Number of other public entities serviced: _____

C. How many Texas Municipalities, Public Entities or Government Agencies does your agency (this office, if a national broker) provide coverage on behalf of?

D. How many Texas Municipalities, Public Entities or Government Agencies do you provide windstorm coverage to?

E. What is your (this office, if a national broker) estimated premium volume with Texas Municipalities, Public Entities or Government Agencies?

F. What is your estimated premium volume for windstorm insurance with other Texas Metro Systems?

G. Has your agency been licensed to conduct fire/casualty insurance in Texas for the past five years?

H. Has your agency produced a minimum annual gross fire and casualty premiums of at least \$1,000,000 average for each of the past three years?

I. The CCRTA will expect an annual summary of premium and losses by coverage.

J. Please attach a copy of the following documents:

1. A copy of the current license.
2. The agency must have insurance for agent's errors and omissions with a limit of at least \$1,000,000 per occurrence and \$2,000,000 aggregate.
3. A copy of A.M. Best rating certificate.

K. Please list services that you provide to assist with the placement of TWIA coverage:

APPENDIX B

CERTIFICATION FORM

In submitting this proposal, the undersigned certifies on behalf of its firm and any proposed subcontractors as follows:

- (1) **Proposal Validity Certification:** If this offer is accepted within sixty (60) calendar days from the due date, to furnish the insurance coverage upon which prices are offered within the time specified;
- (2) **Non-Collusion Certification:** Has made this proposal independently, without consultation, communication, or agreement for the purpose of restricting competition as to any matter relating to this Request for Proposals with any other FIRM or with any other competitor,
- (3) **Affirmative Action/DBE Certification:** Is in compliance with the Common Grant Rules affirmative action and Department of Transportation's Disadvantaged Business Enterprise requirements.
- (4) **Conflict of Interest Acknowledgement and Certification:** See Appendix C.
- (5) **Non-Inducement Certification:** The undersigned hereby certifies that neither it nor any of its employees, representatives, or agents have offered or given gratuities (in the form of entertainment, gifts, or otherwise) to any director, officer, or employee of the Corpus Christi Regional Transportation Authority with the view toward securing favorable treatment in the awarding, amending, or the making of any determination with respect to the performance of this Contract.
- (6) **Non-Debarment Certification:** Certifies that it is not included on the U. S. Comptroller General's Consolidated List of Persons or Firms currently debarred for violations of various contracts incorporating labor standards provisions, and from Federal programs under DOT regulations 2CFR Parts 180 and 1200, or under the FAR at 48 CFR Chapter 1, Part 9.4
- (7) **Integrity and Ethics:** Has a satisfactory record of integrity and business ethics, in compliance with 49 U.S.C. Section 5325(j)(2)(A)
- (8) **Public Policy:** Is in compliance with the public policies of the Federal Government, as required by 49 U.S.C. Section 5325(j)(2)(B)
- (9) **Administrative and Technical Capacity:** Has the necessary organization, experience, accounting, and operational controls, and technical skills, or the ability to obtain them, in compliance with 49 U.S.C. Section 5325(j)(2)(D)
- (10) **Licensing and Taxes:** Is in compliance with applicable licensing and tax laws and regulations
- (11) **Financial Resources:** Has, or can obtain, sufficient financial resources to perform the contract, as required by 49 U. S. C. Section 5325 (j)(2)(D)
- (12) **Production Capability:** Has, or can obtain, the necessary production, construction, and technical equipment and facilities.
- (13) **Timeliness:** Is able to comply with the required delivery or performance schedule, taking into consideration all existing commercial and governmental business commitments.
- (14) **Performance Record:** Is able to provide a satisfactory current and past performance record.

Signature

Printed Name

Title

Date

APPENDIX C

CONFLICT OF INTEREST ACKNOWLEDGEMENT AND CERTIFICATION

1. The Contractor represents that no officer or employee of the CCRTA has a Substantial Interest (defined as any interest which has a value of \$5,000.00 or more or represents ten percent (10%) or more of a person's gross income during the most recent calendar year) in this Contract. The Contractor further represents that no officer or employee of the CCRTA has (1) colluded with the Contractor in a recommendation for award, bid, proposal or solicitation on any CCRTA contracts, or (2) received any pecuniary benefit from the Contractor within the past six (6) months.
2. The Contractor agrees to ensure that the CCRTA's Code of Ethics is not violated as a result of the Contractor's activities in connection with this Contract. The Contractor agrees to immediately inform the CCRTA if it becomes aware of the existence of any such Substantial Interest or Conflict of Interest, or the existence of any violation of the Code of Ethics arising out of or in connection with this Contract.
3. The CCRTA may in its sole discretion, require the Contractor to cause an immediate divestiture of such Substantial Interest or elimination of such Conflict of Interest, and failure by the Contractor to comply shall render this Contract voidable by the CCRTA. Any willful violation of these provisions, creation of a Substantial Interest or existence of a Conflict of Interest with the express or implied knowledge by the Contractor shall render this Contract voidable by the CCRTA.
4. In accordance with section 176.006, Texas Local Government Code, the Contractor is required to file a Conflict of Interest Questionnaire (CIQ) within seven business days of becoming aware of a Conflict of Interest under Texas law. The CIQ can be obtained from the Texas Ethics Commission at www.ethics.state.tx.us. The CIQ shall be sent to CCRTA's Director of Procurement or its designee.

I DO CERTIFY THAT THE CONTENTS OF THIS ACKNOWLEDGEMENT AND CERTIFICATION ARE TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE, INFORMATION, AND BELIEF.

Signature of Certifying Person: _____

Title: _____

Certifying Person (Print or Type): _____

Date: _____

APPENDIX D

ACKNOWLEDGEMENT OF ADDENDUM/ADDENDA

_____ (Firm Name) acknowledges receipt of the following addendum/addenda.

List all addenda numbers below:

Signature: _____

Printed Name: _____

Title: _____ Date: _____

APPENDIX E

REFERENCES

REFERENCES: The Proposer must supply a list of four (4) similar projects which your company has completed within the last five (5) years that satisfactorily met the client’s specifications (**exclude CCRTA as a reference**).

- 1. Company: _____
Owner: _____ Contact: _____
Address: _____
Telephone No.: _____
Email Address: _____
Project: _____
Date Completed: _____ Cost: _____

- 2. Company: _____
Owner: _____ Contact: _____
Address: _____
Telephone No.: _____
Email Address: _____
Project: _____
Date Completed: _____ Cost: _____

- 3. Company: _____
Owner: _____ Contact: _____
Address: _____
Telephone No.: _____
Email Address: _____
Project: _____
Date Completed: _____ Cost: _____

- 4. Company: _____
Owner: _____ Contact: _____
Address: _____
Telephone No.: _____
Email Address: _____
Project: _____
Date Completed: _____ Cost: _____

CONTRACTS ON HAND: The Proposer must provide a list of contracts that the firm is currently in process:

APPENDIX F

REQUEST FOR INFORMATION/EXCEPTIONS/APPROVED EQUALS REQUEST

(Please submit **one** form for **each** Request for Information/exception/approved equal)

Page: _____

VENDOR: _____

PROJECT: RFP No. 2023-I-10

PAGE: _____ PARAGRAPH: _____ SUBJECT: _____

Request:

Signature

FOR CCRTA USE

Approved: _____ Disapproved: _____ Clarification: _____

Response:

Chief Executive Officer/Designee

APPENDIX G

BIDDER/OFFEROR/PROPOSER INFORMATION SHEET

Bidder/Offeror/Proposer	
Company Name	
Street Address	
City, State, Zip Code	
Federal Employer Identification Number (FEIN) or Taxpayer Identification Number (TIN)	
Unique Identity ID # (12-character alphanumeric ID assigned to an entity by SAM.gov.)	
Is the Company a subsidiary? If yes, name the Holding/Parent Company	
Number of years in business	
Commodity/NAICS Code and Corresponding Index Entry	
Disadvantaged Business Enterprise (DBE) Certification	
DBE	Certification Year: Agency Name:
Bidder/Offeror/Proposer Primary Contact	
Name	
Title	
Office Telephone Number (with area code)	
Cell Telephone Number (with area code)	
E-mail Address	
Authorized Signatory (If different from Primary Contact)	
Name	
Title	
Office Telephone Number (with area code)	
Cell Telephone Number (with area code)	
E-mail Address	