

**Request for Proposals
RFP# 21-01**

Insurance Coverage for a Public Authority of the Commonwealth of
Virginia

Activity	Date By
RFP Issued	November 2, 2020
Deadline for Prospective Offeror to Submit Questions	November 12, 2020
Answers to Submitted Questions Posted on PlanRVA website	November 13, 2020
Proposal Submission Deadline	November 20, 2020
CVTA Finance Committee Review	December 9, 2020
CVTA Selects Preferred Vendor	January 29, 2021
Coverage Start Date	TBD

Purpose:

The purpose and intent of this Request for Proposal (RFP) is to solicit proposals from prospective vendor(s) to provide recommendations and proposals for insurance coverage to include public officials' liability, general liability, auto liability hired non-owned, and crime. This Request for Proposals is open to all potential vendors. The CVTA has as a priority to be as inclusive as possible in solicitation and selection of its vendors.

Questions and Submissions:

Any Changes and/or Addenda to this RFP will be posted on the PlanRVA website at <https://planrva.org/home/about-the-commission/purchasing-and-bids/>. Respondents are responsible for checking this website prior to submission for any updates or changes. *Failure to acknowledge all addenda may result in rejection of your proposal as non-responsive.*

Any questions regarding this RFP must be submitted in writing directly to the staff at PlanRVA via email at CVTA@PlanRVA.org no later than 5:00 p.m. on October 23, 2020. All questions from prospective responders and answers regarding this proposal will be posted on the PlanRVA website at <https://planrva.org/home/about-the-commission/purchasing-and-bids/>. Prospective responders will also find links to background information about the Central Virginia Transportation Authority at www.CVTava.org.

Proposals will be received at the Regional Commission by electronic mail ONLY and should be submitted to CVTA@PlanRVA.org. (Proposals that are not submitted electronically via email will not be considered). All information received in response to this request marked Proprietary will be handled accordingly. Responses to the Request will not be returned. Full submission requirements and instructions are detailed herein.

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Insurance Coverage for a Public Authority of the Commonwealth of Virginia

1 Request for Proposal (RFP)

The purpose and intent of this Request for Proposal (RFP) is to solicit proposals from prospective vendors to provide recommendations and proposals for insurance coverage to include public officials' liability, general liability, auto liability hired non-owned, and crime.

The coverage should extend to June 30, 2020 with the option for annual renewal in accordance with the Authority's fiscal year (July-June). Should the award be made with an existing association group that is maintained for the purpose of promoting the interest and welfare of public bodies, the Central Virginia Transportation Authority may choose to continue to renew the contract beyond the renewal set forth in this paragraph (Code of Virginia 2.2-4345).

2 Introduction to the Central Virginia Transportation Authority

The Central Virginia Transportation Authority is a newly-created authority in Central Virginia that provides new funding opportunities for priority transportation investments across the region. This Authority was established by the 2020 General Assembly of Virginia and comprises the counties and city located within Planning District 15. The Authority will administer transportation funding generated through the imposition of an additional regional \$0.07 sales and use tax (revenue collection began October 1, 2020) and a wholesale gas tax of \$0.076 per gallon of gasoline and \$0.077 per gallon of diesel fuel (revenue collection began July 1, 2020). The Authority is responsible for stewardship of the revenue generated through the additional taxes and meeting regional transportation priorities.

PlanRVA, the Regional Commission (Planning District 15/ Richmond Regional Planning District Commission) is providing staff support to the Authority as it forms and will continue to provide administrative support services through June 30, 2021. The Central Virginia Transportation Authority will make all decisions regarding vendor selection.

3 Selection Criteria

Proposals shall be evaluated using the following criteria as related to the requirements.

<i>Evaluation Criteria</i>	<i>Points</i>
<i>Experience and Qualifications of the Offeror</i>	<i>25</i>
<i>Cost of Providing Services</i>	<i>40</i>
<i>Financial Ratings</i>	<i>20</i>
<i>References</i>	<i>10</i>
<i>Completeness and Clarity of Proposal</i>	<i>5</i>

Offerors who appear most capable of providing coverages that can best satisfy the needs of the Authority, based on the scoring described above, will be selected as finalists for further evaluation. There is no specified number of finalists that may be selected. Finalists may be required to attend an interview session to discuss their proposal.

Selection shall be made among offerors deemed to be fully qualified and best suited among those submitting proposals. Priorities will be recommended on the basis of the evaluation factors included in the Request for Proposals, including price. Negotiations shall be conducted among the offerors so selected as necessary. While price shall be considered, that need not be the sole

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determining factor. After negotiations have been conducted with each offeror so selected, the Authority shall select the offeror which, in its opinion, has made the best proposal and shall award the contract to that offeror. The award document will be a contract incorporating by reference all the requirements, terms, and conditions of the RFP and the offeror's proposal as negotiated. The Authority may cancel this Request for Proposals or reject proposals at any time prior to an award and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous (Code of Virginia, § 2.2-4359D).

The Authority may participate in, sponsor, conduct, or administer a cooperative procurement agreement on behalf of or in conjunction with one or more other public bodies, or public agencies or institutions, or localities of the several states of the United States or its territories, or the District of Columbia, for the purpose of combining requirements to increase efficiency or reduce administrative expenses in any acquisition of goods or services. Except for contracts for professional services, a public body may purchase from another public body's contract even if it did not participate in the request for proposal (RFP) or invitation for bid (IFB), if the RFP or IFB specified that the procurement was being conducted on behalf of other public bodies. Nothing herein shall prohibit the assessment or payment by direct or indirect means of any administrative fee that will allow for participation in such an arrangement.

4 Response Contents and Format

Please complete all sections of the RFP. If additional material is required for one or more questions, please label attachments clearly and reference them in your response. Your response to this RFP will serve as the basis for the consideration of your potential as a provider of the requested services.

5 Proposal Requirements

Each proposal must include the detailed information described, in the order listed below, in order to be considered:

- 5.1. Provide a letter of introduction that includes the name and location of the company, a statement of interest, and the ability to provide the required services. The letter of introduction shall be signed by an individual authorized to conduct business for the firm with the name of the individual typed below the signature. Relevant contact information (telephone, business address, email) must be included in the letter of introduction.
- 5.2. Provide description of risk management and loss control services and claims handling procedures. Provide examples of reports including claims summary, claim expense, and experience reports.
- 5.3. Outline capability to accept additions/deletions of autos/property, etc., as well as claims reports electronically.
- 5.4. Complete Offeror Data Sheet (Submittal A) listing three references that have utilized services/coverage proposed, preferably for like public entities or local governments. The Authority may contact references to inquire about their satisfaction with services provided.
- 5.5. Provide information and pricing for associated risk management programs or other products the Authority might consider upon recommendation (Cyber Risk and Liability coverages, etc).

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5.6. Itemize the cost of providing each type of coverage.

5.7. Provide company financial ratings (Submittal B).

6. PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS:

6.1. GENERAL REQUIREMENTS

- 6.1.1. Offerors must submit one complete digital copy to CVTA@PlanRVA.org with the RFP referenced in the Subject Line. No other form or distribution of the proposal shall be made by the Offeror.
- 6.1.2. Proposals shall be signed by an authorized representative of the Offeror. All information requested must be submitted. Failure to submit all information requested may result in requiring prompt submission of missing information and/or giving a lower evaluation of the proposal. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.
- 6.1.3. Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content. Elaborate artwork, expensive or irregular paper, bindings, visual, and other presentation aids are not required.
- 6.1.4. Digital copies of the proposal should be formatted to print on 8-1/2" x 11" paper. All documentation submitted with the proposal should be contained in a single file.
- 6.1.5. Ownership of all data, materials, and documentation originated and prepared pursuant to the RFP shall belong exclusively to the Authority and be subject to inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the Offeror must invoke the protection of Section 2.2-4342 of the Virginia Public Procurement Act prior to or upon submission of the data or other materials to be protected and state the reasons why protection is necessary.

6.2 SUBMITTAL REQUIRED ELEMENTS

The following must be included in order to consider a Proposal complete and eligible for consideration:

- 6.2.1 Signature pages of this RFP signed and completed as required.
- 6.2.2 Offeror's complete Proposal, as described under Proposal Requirement Section.
- 6.2.3 Completed Offeror Data Sheet, Submittal A.
- 6.2.4 Completed Cost Proposal, Submittal B.

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7 TIME FRAME/SCHEDULE OF EVENTS

The following is the expected timeline of activities associated with this RFP. Failure to comply with any key dates will render the submission ineligible for consideration.

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RFP Issued	November 2, 2020
Deadline for Prospective Offeror to Submit Questions	November 12, 2020
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8 Communications and Response

Martha Heeter, PlanRVA's Executive Director, is the designated representative for this initiative. For any information relative to this RFP, please direct inquiries to the designated representative only. All inquiries and requests should be submitted in writing via email to:

mheeter@PlanRVA.org or CVTA@PlanRVA.org with attn: CVTA Insurance RFP in the Subject Line

9 Clarification Questions

Any questions regarding the RFP should be submitted in writing no later than 5:00 p.m. on November 12, 2020. Answers will be provided to all prospective respondents at <https://planrva.org/home/about-the-commission/purchasing-and-bids/> by 5:00 p.m., November 13, 2020.

10 Response Delivery Instructions

Please submit an electronic copy of your proposal to the email address indicated in the *Communications and Response* section above. All responses must be received on or before close of business (5:00 p.m.) on November 20, 2020 as indicated in the Time Frame/ Schedule of Activities table (Section 7).

11 Vendor Presentations

The Authority may elect to hold interviews and/or contract negotiations with one or more firms should additional information be required to make a final decision for contract award or to facilitate negotiations. On behalf of the Authority, PlanRVA will try to provide the affected firms with as much advance notice as possible.

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12 No Obligation

The submission of a proposal shall not in any manner oblige the Authority to enter a contract or to be responsible for the costs incurred by the Offeror's organization in responding to this request.

13 Agreement of Non-Disclosure

This document is proprietary and shall not be disclosed to any other party. It is designed, developed, and submitted to potential partners of the Authority solely for its benefit. The Central Virginia Transportation Authority will have complete ownership of the final product delivered by the vendor selected through this RFP. Any and all information deemed proprietary should be marked as such with expectation of agreement reached among both parties with regard to publication.

14 No Guarantee

The Authority and PlanRVA make no guarantee of future commitments and offers information regarding fiscal year renewals for directional purposes only, to assist vendors with proposal preparation.

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Submittal A

OFFEROR DATA SHEET

1. QUALIFICATIONS: The Offeror shall have the capability and the capacity in all respects to fully satisfying all the requirements indicated in this RFP.

2. YEARS IN BUSINESS: Indicate the length of time the Bidder has been in business providing the goods/services in this solicitation:

 _____Years_____Months.

3. REFERENCES: Offerors shall provide three (3) references for which the company has provided specified goods/services of the same or greater scope within the last three (3) years.

1.	Customer Name:	Contact Name:	Contact Title:
Address:			Phone No.
			Email adr

2.	Customer Name:	Contact Name:	Contact Title:
Address:			Phone No.
			Email adr

3.	Customer Name:	Contact Name:	Contact Title:
Address:			Phone No.
			Email adr

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PROPOSAL WORKSHEET

In compliance with this Request For Proposals (RFP) and all conditions imposed in this RFP, the undersigned firm hereby offers and agrees to furnish all goods and services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation, and the undersigned firm hereby certifies that all information provided below and in any schedule attached hereto is true, correct, and complete.

<i>SIGNATURE PAGE</i>	
Name of Agency Submitting	
Address:	
Phone Number:	
Fax Number:	
Contact Person:	
Title:	
Email Address:	
Company Representative Signature:	
Date:	