



## **FY25-051 Addendum 1**

### **USI Insurance Services LLC**

### **Supplier Response**

#### **Event Information**

Number: FY25-051 Addendum 1  
Title: Risk Liability Coverage - Detox Center  
Type: Request For Proposal  
Issue Date: 4/10/2025  
Deadline: 6/25/2025 05:00 PM (CT)  
Notes: The City of Laredo has established a local vendor preference ordinance 2018-O-175. All informal and formal Requests for Proposals for contracts will be evaluated with a 5% preference for local vendors.

Proposers are strongly encouraged to submit their proposals electronically through use of Cit-E-Bid or in person - hand delivery. Mailed Proposals (i.e. USPS, FedEx, UPS), telegraphic, emails or facsimile proposals will not be considered. Request for Proposals may be hand delivered at the City Secretary Office, 1110 Houston St., 3rd. floor, Laredo, Texas 78040 until 5:00 P.M. on June 25, 2025 and all proposals received will be opened and publicly acknowledged at 10:00 A.M. on June 26, 2025.

## Contact Information

Contact: Tania Herrera  
Address: Purchasing Division  
5512 Thomas Ave  
Laredo, TX 78041  
Phone: (956) 794-1734  
Email: [therrera1@ci.laredo.tx.us](mailto:therrera1@ci.laredo.tx.us)

## USI Insurance Services LLC Information

Contact: Robert S. Bookhammer  
Address: 14241 Dallas Parkway, Ste. 700  
Dallas, TX 75254  
Phone: (972) 737-6210  
Email: bob.bookhammer@usi.com  
Web Address: www.usi.com

By submitting your response, you certify that you are authorized to represent and bind your company.

Robert S. Bookhammer  
*Signature*

bob.bookhammer@usi.com  
*Email*

Submitted at 6/23/2025 04:08:51 PM (CT)

## Supplier Note

Dear Ms. Herrera, Thank you for this opportunity to propose our 25-26 renewal to City of Laredo for your ROOTS Recovery Center. We value our relationship with the City and look forward to renewing our partnership. Please reach out with any questions.

## Requested Attachments

### Non-Collusive Affidavit Form

This form must be notarized and submitted with your response.

Non Collusion Affidavit Signed & Notarized.pdf

### Certificate of Interested Parties

Form 1295 is to be submitted upon award of bid.

Form 1295 Certificate 101381771 Signed.pdf

### Conflict of Interest Form

Vendor needs to address if there is a conflict of interest, CIQ form has to be submitted with your response.

Conflict of Interest Questionnaire Signed.pdf

### Proposal/Forms

Proposal/forms must be completed by the proposer and attached to the proposal. Forms are in Attachment A.

COL ROOTS Recover Center Proposal Forms Combined.pdf

## Response Attachments

### Commission Schedule.xlsx

USI Commission Schedule

### City of Laredo - Loss Control Services Form signed.pdf

USI Loss Control Services Form

### Exception Form for Automobile Liability Completed & Signed.pdf

USI Automobile Liability Exception Form

### Exception Form for General Liability Completed & Signed.pdf

USI General liability Exception Form

### Exception Form for Professional Liability Completed & Signed.pdf

USI Professional Liability Exception Form

## Exception Form for Umbrella-Excess Liability Completed & Signed.pdf

UI Umbrella Excess Liability Exception Form

## General Requirements Form.pdf

USI General Requirements Form

## Servicing Criteria Form.pdf

USI Servicing Criteria Form

## Ironshore GL\_PL Quote & Policy Form 6-11-25.pdf

Ironshore GL\_PL Quote & Policy Form

## Munich Re \$2M xs Primary 25-26 Quote & Policy Form.pdf

Munich 2XP Excess Liability Quote & Policy Form

## Pro-Praxis 3X2 Excess Liability Quote & Policy Form.pdf

Pro-Praxis 3x2 XS Liability Quote & Policy Form

## RSUI 5x5xP XS Liability Quote & Policy Form.pdf

RSUI 5x5xP XS Liability Quote & Policy Form

## Lloyd's Primary \$1M HNOA Quote & Policy Form.pdf

Lloyd's of London \$1M Primary HNOA Quote & Policy Form

## Lloyd's HNOA 1 X P XS HNOA Quote & Policy Form.pdf

Lloyd's of London 1x1xP HNOA Quote & Policy Form

## Gen Star 1 X 1 X P HNOA Quote & Policy Form.pdf

Gen Star 1x1xP HNOA Quote & Policy Form

## Bid Attributes

### 1 Addendum #1

Attachment of Vehicle Policy - Go to ATTACHMENTS Tab

☒ I acknowledge this Addendum #1

### 2 Award by Best Value

Proposal will be awarded based on evaluated criteria and to the bidder who provides the best value to the City of Laredo and who's proposed price and other factors have been considered in accordance to the provisions of Chapters 252 and 271 of the State of Texas – Local Government Code.

☒ I agree

### 3 Terms and Conditions Request for Proposals

**TERMS AND CONDITIONS OF INVITATIONS FOR PROPOSALS** These Terms and Conditions are considered standard language for all City of Laredo solicitation documents. If any specific proposal requirements differ from the general terms listed here, the specific proposal requirements shall prevail.

A response to any Request for Proposal is an offer to contract with the City based upon the terms, conditions, and specifications contained in the City's Request for Proposal. Proposals do not become contracts unless and until they are executed by the City. A contract has its inception in the award, eliminating a formal signing of a separate contract, unless requested by the City. For that that reason, most if not all the terms and conditions of the contract are contained in the Request for Proposal, unless any of the terms and conditions are modified by a Request for Proposal amendment, a contract amendment, or by mutually agreed terms and conditions in the contract documents.

**GENERAL CONDITIONS** Vendors are required to submit Proposals upon the following expressed conditions:

(a) Vendors shall thoroughly examine the specifications, schedule instructions and other contract documents. Once the award has been made, failure to read all specifications, instructions, and the contract documents, of the City shall not be cause to alter the original contract or for a vendor to request additional compensation.

(b) Vendors shall make all investigations necessary to thoroughly inform themselves regarding facilities and

locations for delivery of materials and equipment as required by the Proposal conditions. No pleas of ignorance by the vendor of conditions that exist or that may hereafter exist as a result of failure or omission on the part of the vendor to make the necessary examinations and investigations, or failure to fulfill in every detail the requirements of the contract documents, will be accepted as a basis for varying the requirements of the City or the compensation to the vendor.

(c) Vendors are advised that City contracts are subject to all legal requirements provided for in the City Charter and/or applicable City Ordinances, State and Federal Statutes.

**1.0 PREPARATION OF PROPOSALS** Proposals will be prepared in accordance with the following:

(a) All information required by the proposal form shall be furnished. For hand delivered submittals only, the vendor shall print or type the business name and manually sign the schedule. For electronic submittals, this information shall be submitted electronically on Cit-E-Bid system. If submitted electronically, this information shall be submitted electronically on Cit-E-Bid system by going to the following link: <https://cityoflaredo.ionwave.net/Login.aspx> If vendor submits both manual and electronic bids, the electronic bid will replace the manual bid and shall be considered the only valid bid.

(b) Unit prices shall be shown and where there is an error in extension of price, the unit price shall govern.

(c) Alternate Proposals will not be considered unless authorized by the invitation for proposals or any applicable addendum.

(d) Proposed delivery time must be shown and shall include business days.

(e) Vendors will not include Federal taxes or State of Texas limited sales tax in proposal prices since the City of Laredo is exempt from payment of such taxes. An exemption certificate will be furnished upon request.

**2.0 DESCRIPTION OF SPECIFICATIONS & SUBSTITUTIONS** It is the responsibility of the prospective proposer to review the entire invitation to proposal packet and to notify the City of Laredo if the specifications are formulated in a manner that would restrict competition. Any such protest regarding the specifications or proposal procedures must be received by City of Laredo no less than seventy-two hours prior to the time set for proposal opening. Vendors are required to state exactly what they intend to furnish. Otherwise, when applicable, vendors will be required to furnish the items as specified.

**3.0 SUBMISSION OF PROPOSALS**

(a) Proposals and changes thereto shall be enclosed in sealed envelopes, properly addressed and to include the date and hour of the Proposal opening and the material or services. Proposal shall be typed or written on the face of the envelope. Unless otherwise noted on the Notice to Vendors cover sheet, all hand delivered Proposals must be submitted to the City of Laredo, City Secretary's Office, City Hall Third Floor, 1110 Houston Street.

(b) Proposals forms can be downloaded printed through Cit-E-Bid. Proposals can be submitted electronically through Cit-E-Bid by going to the following link: <https://cityoflaredo.ionwave.net/Login.aspx>

**Mailed Bids (i.e. USPS, FedEx, UPS), telegraphic, emails or facsimile bids will not be considered.**

(c) Samples, when required, must be submitted within the time specified, at no expense to the City of Laredo. If not destroyed or used up during testing, samples will be returned upon request at the Vendors expense.

(d) Proposals must be valid for a period of one hundred and twenty (120) days. An extension to hold proposal pricing for actual quantity bids may be requested by the City.

(e) The City shall pay no costs or other amounts incurred by any entity in responding to this RFP, or as a result of issuance of this RFP.

**4.0 REJECTION OF PROPOSALS** The City may reject a proposal if:

(a) Vendor misstates or conceals any material fact in the proposal.

(b) Proposal does not strictly conform to the law or the requirements of the proposal.

(c) Vendor is in arrears on existing contracts or taxes with the City of Laredo.

(d) If proposals are conditional. Vendor may qualify their Proposal for acceptance by the City on an "ALL OR NONE" basis. An "ALL OR NONE" basis proposal must include all items in the specifications.

(e) In the event that a vendor is delinquent in the payment of City of Laredo taxes on the day the proposals are opened, including state and local taxes, such fact may constitute grounds for rejection of the proposal or cancellation of the contract. A vendor is considered delinquent, regardless of any contract or agreed judgments to pay such delinquent taxes.

(f) No proposal submitted herein shall be considered, unless the vendor warrants that, upon execution of a contract with the City of Laredo, vendor will not engage in employment practices such as discriminating against employees because of race, color, sex, creed, or national origin. Vendor will submit such reports as the City may therefore require assuring compliance with said practices.

(g) The City may reject all proposals or any part of a proposal whenever it is deemed necessary.

(h) The City may waive any minor informalities or irregularities in any proposal.

**5.0 WITHDRAWAL OF PROPOSALS** Proposals may not be withdrawn after they have been publicly opened, unless approved by the City Council.

**6.0 LATE PROPOSALS OR MODIFICATIONS** Proposals and modifications received after the time set for the submittal deadline will not be considered. Late proposals will be returned to the vendor unopened.

**7.0 CLARIFICATION AND PROTEST PROCEDURE**

(a) It is the responsibility of the prospective proposer to review the entire invitation to proposal packet and to notify the City of Laredo if the specifications are formulated in a manner that appears ambiguous. Any request for clarification or additional information must be submitted in writing through email or Questions & Responses section on Cit-E-Bid system no later than seven (7) days prior to the scheduled date for opening to: CITY OF LAREDO PURCHASING AGENT Jaime Zapata, 5512 Thomas Avenue, Laredo, Texas 78041; email:

jezapata@ci.laredo.tx.us. Any vendor submitting questions shall make reference to a specific RFP number, section, page and item of this solicitation. Questions untimely submitted may not elicit a response. It is the bidder's responsibility to follow up and make certain that the request was received. In case there are changes, additions, and/or edits to the original scope, an addendum will be issued by the Purchasing Agent to all vendors through Cit-E-Bid system under Questions and Responses section to clarify any inquiries. The City will not be responsible for any other interpretations of the proposal. During the RFP process, bidder, or any persons acting on their behalf, shall not contact any City official or employee staff except those specifically designated in this or another subsequent solicitation document. Pursuant to §4.03 of the City Ethics, non-compliance with this provision may result in disqualification of the offer involved.

(b) For solicitations for goods and non-professional services valued at more than \$50,000, bidders will have ten (10) calendar days prior to the time that the City Council formally considers the contract to submit a written protest relating to advertising of bid notices, deadlines, bid opening, and all other related procedures under the Local Government Code, as well as any protests relating to alleged improprieties or ambiguities in the specifications. If the vendor does not file a written protest within this time, the vendor will have waived all rights to formally protest the intent to award. All protests regarding the bid solicitation process must be submitted in writing by certified mail to: CITY OF LAREDO PURCHASING AGENT Enrique Aldape III, 5512 Thomas Avenue, Laredo, Texas 78041 ealdape@ci.laredo.tx.us. Within five (5) business days of receiving a timely protest, the Purchasing Agent shall provide written response to the protesting vendor of the decision following a review of the legitimacy and procedural correctness of the procurement documents. A protesting vendor may appeal to the Laredo City Manager if dissatisfied with the decision of the Purchasing Agent. Only after exhausting all administrative procedures through the City Manager is a protesting vendor then entitled to appeal the award of the contract to the Laredo City Council.

## **8.0 VENDOR DISCOUNTS**

(a) Percentage discounts within a certain period of time will be accepted but cannot be used in RFP evaluations. The period of the discount offered should be sufficient to permit payments within such period in the regular course of business by the City of Laredo.

(b) In connection with any discounts offered, time will be computed from the date of receipt of supplies or service or from the date a correct invoice is received, whichever is the later date. Payment is deemed to be made on the date the check is mailed.

## **9.0 INTENT OF CONTRACT**

(a) **ANNUAL SERVICE CONTRACT:** The services are based on the best available information. The purpose of this contract is to establish prices for the commodities or services needed, should the City need to purchase these commodities or services. Since the quantities are estimates, the City may purchase more than the estimated quantities, less than the estimated quantities, or not purchase any quantities at all. The needs of the City shall govern the amount that is purchased and change orders shall not be applicable. The City's obligation for performance of an annual service contract beyond the current fiscal year is contingent upon the availability of appropriated funds from which payments for the contract purchases can be made. If no funds are appropriated and budgeted during the next fiscal year, this contract becomes null and void.

**10.0 AWARD OF CONTRACT** The contract will be awarded based on **(best value criteria)** as follow and in accordance with the provisions of Chapter 252 and 271 of the Texas Local Government Code.

Definition of best value criteria as per The Institute for Public Procurement is:

***"Best Value: 1. A procurement method that emphasizes value over price. 2. An assessment of the return that can be achieved over the useful life of the item, e.g., the best combination of quality, service, time, price."***

If the awarded responder is unable to meet the requirements of the City, services/products may be purchased from the next best available Vendor until a Vendor is found that can complete the requirements of the City. This RFP shall not be construed by any party as an agreement of any kind between the City and such party. The award of a contract shall be subject to the approval of the City Council. Following an award, City in its sole option may elect to negotiate a formal agreement with Vendor that will include by reference the terms of the RFP and related responses. In the event an Agreement cannot be reached with the selected Vendor, the City reserves the right to select and negotiate with an alternate Vendor. The City reserves the right to accept any item or group of items in the proposal specifications, unless the Vendor qualifies its proposal by specific limitation. The Vendor shall bear the burden of proof of compliance with the City of Laredo specifications. When applicable, prices must be quoted F.O.B. Destination, Laredo, Texas, unless otherwise specified in the invitation to proposal. The place of delivery shall be set forth in the purchase order and/or formal contract agreement when applicable. A duly authorize purchase order number shall reference item/services description, item number, quantity and price. Invoices shall reference the assign purchase order number to avoid any duplication (2 CFR 200.318 (d)). The City shall give written notice to

the Vendor if any of the following conditions exist:

(1) Vendor does not provide materials in compliance with specifications and/or within the time schedule specified in proposal; (2) Vendor neglects or refuses to remove materials or equipment which have been rejected by the City of Laredo if found not to comply with the specifications; or, (3) Vendor makes an unauthorized assignment. Upon receiving written notification from the City that one of the above conditions has occurred, the Vendor must remedy the problem within seven (7) business days, to the complete satisfaction of the City, or the contract will be immediately canceled. (4) Contract terms are the responsibility of the awarded vendor(s) and the respective City user department(s).

#### **11.0 ENTIRE AGREEMENT**

(a) All covenants, conditions and agreement contained in the solicitation, are hereby made part of the Agreement to the same extent and with the force as is fully set forth herein. If and to the extent of this Agreement and the terms of this solicitation and supplier response conflict Terms & Conditions of this solicitation shall control.

#### **12.0 PAYMENT & INVOICING**

(a) All invoices to the City of Laredo have a 30 day term from receipt of supplies or completion of services.

(b) Discount terms will be computed from the date of receipt and acceptance of supplies or services. Payment shall be deemed to be made from that date.

(c) All invoices must show the purchase order number and invoices shall be legible. Items billed on invoices should be specific as to applicable stock, manufacturer catalog or part number. All items must show unit prices. If prices are based on discounts from list, then list prices must appear on bid schedule. All invoices shall be mailed to the Accounts Payable Office, City Hall, P.O. Box 210, Laredo, Texas 78042. (d) Electronic Funds Transfer (EFT) payments are also available; if electronic payments are preferred, an Electronic Funds Transfer (EFT) Authorization form needs to be completed and returned via e-mail to: jjolly@ci.laredo.tx.us For more information please contact Mr. Jorge Jolly, Accounts Payable Manager at (956) 791-7425.

#### **13.0 In accordance to State of Texas, the City of Laredo follows State practices when awarding any and all competitive solicitations:**

TEXAS ENGINEERING AND LAND SURVEYING PRACTICE ACTS AND RULES CONCERNING PRACTICE AND LICENSURE

OCCUPATIONS CODE TITLE 6. REGULATION OF ENGINEERING, ARCHITECTURE, LAND SURVEYING, AND RELATED PRACTICES SUBTITLE A. REGULATION OF ENGINEERING AND RELATED PRACTICES CHAPTER 1001. TEXAS BOARD OF PROFESSIONAL ENGINEERS AND LAND SURVEYORS

CHAPTER 137: COMPLIANCE AND PROFESSIONALISM

SUBCHAPTER C: PROFESSIONAL CONDUCT AND ETHICS

§137.53 ENGINEER STANDARDS OF COMPLIANCE WITH PROFESSIONAL SERVICES PROCUREMENT ACT

(a) A licensed engineer shall not submit or request, orally or in writing, a competitive bid to perform professional engineering services for a governmental entity unless specifically authorized by state law and shall report to the board any requests from governmental entities and/or their representatives that request a bid or cost and/or pricing information or any other information from which pricing or cost can be derived prior to selection based on demonstrated competence and qualifications to perform the services. (b) For the purposes of this section, competitive bidding to perform engineering services includes, but is not limited to, the submission of any monetary cost information in the initial step of selecting qualified engineers.

Cost information or other information from which cost can be derived must not be submitted until the second step of negotiating a contract at a fair and reasonable cost. (c) This section does not prohibit competitive bidding in the private sector. Source Note: The provisions of this §137.53 adopted to be effective May 20, 2004, 29 TexReg 4878; amended to be effective June 4, 2007, 32 TexReg 2996.

☒ I Agree to the Terms and Conditions

#### 4 Insurance Terms and Conditions

**INSURANCE REQUIREMENTS** If and when applicable or required by the contract, the successful bidder(s) shall furnish the City with original copies of valid insurance policies herein required upon execution of the contract and shall maintain said policies in full force and effect at all times throughout the term of this contract.

(a) Commercial General Liability insurance at minimum combined single limits of \$1,000,000 per-occurrence and \$2,000,000 general aggregate for bodily injury and property damage, which coverage shall include products/completed operations (\$1,000,000 products/completed operations aggregate) and XCU (Explosion, Collapse, Underground) hazards. Coverage must be written on an occurrence form. Contractual Liability must be maintained covering the Contractors obligations contained in the contract. The general aggregate limit must be at least two (2) times the each occurrence limit.

(b) Workers Compensation insurance at statutory limits, including Employers Liability coverage a minimum limits of \$1,000,000 each-occurrence each accident/\$1,000,000 by disease each-occurrence/\$1,000,000 by disease aggregate.

(c) Commercial Automobile Liability insurance at minimum combined single limits of \$1,000,000 per-occurrence for bodily injury and property damage, including owned, non-owned, and hired car coverage.

(d) Professional Liability, Errors & Omissions coverage, with minimum limits of \$1,000,000 per claim/ \$2,000,000 annual aggregate. This coverage must be maintained for at least two years after the project is completed. If coverage is written on a claims-made basis, a policy retroactive date equivalent to the inception date of the contract (or earlier) must be maintained during the full term of the contract.

(e) Any Subcontractor(s) hired by the Contractor shall maintain insurance coverage equal to that required of the Contractor. It is the responsibility of the Contractor to assure compliance with this provision. The City of Laredo accepts no responsibility arising from the conduct, or lack of conduct, of the Subcontractor.

(f) A Comprehensive General Liability insurance form may be used in lieu of a Commercial General Liability insurance form. In this event, coverage must be written on an occurrence basis, at limits of \$1,000,000 each-occurrence, combined single limit, and coverage must include a broad form Comprehensive General Liability Endorsement, products/completed operations, XCU hazards, and contractual liability.

(g) With reference to the foregoing insurance requirement, Contractor shall specifically endorse applicable insurance policies as follows:

1. The City of Laredo shall be named as an additional insured with respect to General Liability and Automobile Liability.

2. All liability policies shall contain no cross liability exclusions or insured versus insured restrictions.

3. A waiver of subrogation in favor of the City of Laredo shall be contained in the Workers compensation, and all liability policies.

4. All insurance policies shall be endorsed to require the insurer to immediately notify The City of Laredo of any material change in the insurance coverage.

5. All insurance policies shall be endorsed to the effect that The City of Laredo will receive at least sixty- (60) days' notice prior to cancellation or non-renewal of the insurance.

6. All insurance policies, which name The City of Laredo as an additional insured, must be endorsed to read as primary coverage regardless of the application of other insurance.

7. Required limits may be satisfied by any combination of primary and umbrella liability insurances.

8. Contractor may maintain reasonable and customary deductibles, subject to approval by The City of Laredo.

9. Insurance must be purchased from insurers that are financially acceptable to the City of Laredo. Insurer must be rated A- or greater by AM Best Rating with an admitted carrier licensed by the Texas Department of Insurance.

(h) All insurance must be written on forms filed with and approved by the Texas Department of Insurance. Certificates of Insurance shall be prepared and executed by the insurance company or its authorized agent and shall contain provisions representing and warranting the following:

1. Sets forth all endorsements and insurance coverage's according to requirements and instructions contained herein.

2. Shall specifically set forth the notice-of-cancellation or termination provisions to The City of Laredo.

(i) Upon request, Contractor shall furnish The City of Laredo with certified copies of all insurance policies.

**(j) Certificates of insurance are always subject to review and approval from the City of Laredo Risk Management.**

(k) Specialty certificates and licenses must be inspected and verified for accuracy and validity before award of contract.

(l) Awarded vendor is required to maintain current and active all: certifications, licenses, permits and/or insurance coverages, required to perform work, throughout the duration of this project/contract.

☒ I agree my insurance meets minumum requirements



## 5 Disqualification & Debarment Certification

**DISQUALIFICATION & DEBARMENT CERTIFICATION** By submitting this request for bids, proposal or statement of qualifications, the firm certifies that it is not currently debarred or eligible for debarment from the City of Laredo pursuant to **Ordinance No. 2017-O-098**, and that it is not an agent of a person or entity that is currently debarred from receiving contracts from any political subdivision or agency of the State of Texas. The City will further verify debarment status through use of the federal website SAM.gov. The contract parties are further prohibited from making any award at any tier to any party that is debarred or suspended or otherwise excluded from or ineligible for participation in Federal Assistance Programs under Executive Order 12549, "Debarment and Suspension."

By executing this agreement, the Engineer certifies that it is not currently debarred, suspended, or otherwise excluded from or ineligible for participation in Federal Assistance Programs under Executive Order 12549. The parties to this contract shall require any party to a subcontract or purchase order awarded under this contract to certify its eligibility to receive Federal funds and, when requested by the City, to furnish a copy of the certification. Additionally, in accordance with Chapter 2270, Texas Government Code, a governmental entity may not enter into a contract with a company for goods or services unless the contract contains a written verification from the company that it: (1) does not boycott Israel; and (2) will not boycott Israel during the term of the contract.

The signatory executing this contract on behalf of company verifies that the company does not boycott Israel and will not boycott Israel during the term of this contract. S.B. 252 (V. Taylor/S. Davis) is a bill relating to government contracts with terrorists. The bill provides that: (1) a governmental entity, including a city, may not enter into a governmental contract with a company that is identified on a list prepared and maintained by the comptroller and that does business with Iran, Sudan, or a foreign terrorist organization; and (2) a company that the United States government affirmatively declares to be excluded from its federal sanctions regime relating to Sudan, its federal sanctions regime relating to Iran, or any federal sanctions regime relating to a foreign terrorist organization is not subject to the contract prohibition under the bill.

☒ I certify to the terms and conditions

## 6 Contract Requirements

**1.CODE OF ETHICS ORDINANCE** Vendors doing business with the City of Laredo shall comply with all provisions of the City of Laredo's Code of Ethics (Ordinance, as amended). Vendors may be required to participate in Code of Ethics trainings.

**1.2 PROHIBITED CONTACTS DURING CONTRACT SOLICITATION PERIOD** A person or entity who seeks or applies for a city contract or any other person acting on behalf of such person or entity, is prohibited from contacting city officials and employees regarding such a contract after a Formal Bid, Request for Proposal (RFP), Request for Qualification (RFQ) or other solicitation has been released. This no-contact provision shall conclude when the contract is awarded. The City of Laredo reserves the right to contact respondents and may require such contact as part of the evaluation process (for presentation, clarification) of bids and/or negotiation of RFP submittal(s) prior to the award of contract. If contact is required, such contact will be done in accordance with provisions of Chapter 252 and 271 of the Texas Local Government Code and procedures incorporated into the solicitation document. Violation of this provision by respondents or their agents may lead to disqualification of their offer from consideration.

**1.3 NON-COLLUSIVE AFFIDAVIT (Form can be downloaded and submitted through Cit-E-Bid system)** The City may require that vendors submit a Non-Collusive Affidavit. The vendor will be required to state that the party submitting a proposal or bid, that such proposal or bid is genuine and not collusive or sham; that said Bidder has not colluded, conspired, connived or agreed, directly or indirectly, with any Bidder or Person, to put in a sham bid or to refrain from bidding, and has not in any manner, directly or indirectly, sought by agreement or collusion, or communication or conference, with any person, to fix the bid price or affiant or of any other Bidder, or to fix any overhead, profit or cost element of said bid price, or of that of any other Bidder, or to secure any advantage against the City of Laredo or any person interested in the proposed contract; and that all statements in said proposal or bid are true.

**1.4 CONTRACT DISCLOSURE FORMS (This is submitted through Cit-E-Bid system)** The City of Laredo requires the following forms to be completed as a part of this bid for consideration; 1. Company Information Questionnaire, 2. Signed Price Schedule, 3. Conflict of Interest Questionnaire, 4. Non-Collusive Affidavit 5. Discretionary Contracts Disclosure 6. Certificate of Interested Parties (Form 1295) **\*\*Upon Award of RFP Only\*\***

**1.5 CONFLICT OF INTEREST FORMS (This is submitted through Cit-E-Bid system)** Conflict of Interest Disclosure: A form disclosing potential conflicts of interest involving counties, cities, and other local government entities may be required to be filed after January 1, 2006, by vendors or potential vendors to local government entities. The new requirements are set forth in Chapter 176 of the Texas Local Government Code added by H.B. No. 914 of the last Texas Legislature.

**1.6 TEXAS ETHICS COMMISSION (Form 1295, Form can be downloaded and submitted through Cit-E-Bid system)** Certificate of Interested Parties (Form 1295) Implementation of House Bill 1295: In an effort to comply with state law the certificate of interested parties must be filled out once a vendor has been granted a contract. All of this information can be found on the state of Texas website, please use this link provided, <https://www.ethics.state.tx.us/tec/1295-Info.htm>. In 2015, the Texas Legislature adopted House Bill 1295, which added section 2252.908 of the Government Code. The law states that a governmental entity or state agency may not enter into certain contracts with a business entity unless the business entity submits a disclosure of interested parties to the governmental entity or state agency at the time the business entity submits the signed contract to the governmental entity or state agency. The law applies only to a contract of a governmental entity or state agency that either (1) requires an action or vote by the governing body of the entity or agency before the contract may be signed or (2) has a value of at least \$1 million. The disclosure requirement applies to a contract entered into on or after January 1, 2016. In order to comply with state law the Certificate of Interested Parties (Form 1295) must be submitted to the Texas Ethics Commission within 10 days upon receiving notice of award of contract. This form must be submitted within the allotted time otherwise this may result in the cancellation of the contract.

Changes to Form 1295:

Changes to the law requiring certain businesses to file a Form 1295 are in effect for contracts entered into or amended on or after January 1, 2018. The changes exempt businesses from filing a Form 1295 for certain types of contracts and replace the need for a completed Form 1295 to be notarized. Instead, the person filing a 1295 needs to complete an "unsworn declaration."

☒ I have read and understand this section

|           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
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| <b>7</b>  | <b>Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)</b><br><b>Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)</b><br>Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.<br><input checked="" type="checkbox"/> I have read and understand this section                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>8</b>  | <b>Questionnaire Description</b><br>"The undersigned affirms that they are duly authorized to execute this contract, that this company, corporation, firm, partnership or individual has not prepared this bid in collusion with any other bidder, and that the contents of this bid as to prices, terms or conditions of said bid have not been communicated by the undersigned nor by any employee or agent to any other person engaged in this type of business prior to the official opening of this request. By submitting this bid the vendor agrees to the City of Laredo specifications and all terms and conditions stipulated in the proposed document. That I, individually and on behalf of the business named in this Business Questionnaire, do by my signature below, certify that the information provided in the questionnaire is true and correct ".                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>9</b>  | <b>Name of Offeror (Business) and Name &amp; Phone Number of Authorized Person to sign bid</b><br><div style="border: 1px solid black; padding: 2px;">USI Southwest, Inc. ; Robert S. Bookhammer; 972-737-6210</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>10</b> | <b>State how long under has the business been in its present business name</b><br><div style="border: 1px solid black; padding: 2px;">Thirty-eight (38) years</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>11</b> | <b>If applicable, list all other names under which the Business identified above operated in the last five years</b><br><div style="border: 1px solid black; padding: 2px;">USI Southwest, Inc. is wholly owned by USI Insurance Services, LLC</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>12</b> | <b>State if the Company is a certified minority business enterprise</b><br>The below information is requested for statistical and tracking purposes only and will not influence the amount of expenditure the City will make with any given company.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>13</b> | <b>Questions Part 1</b><br>1) Is any litigation pending against the Business? 2) Has the Business ever been declared "not responsive" for the purpose of any governmental agency contract award? 3) Has the Business been debarred, suspended, proposed for debarment, suspended, proposed for debarment, declared ineligible, voluntarily excluded, or other wise disqualified from bidding, proposing or contracting? 4) Are there any proceedings, pending relating to the Business responsibility, debarment, suspension, voluntary exclusion, or qualification to receive a public contract? 5) Has the government or other public entity requested or required enforcement of any of its rights under a surety agreement on the basis of default or in lieu of declaring the Business at default?<br><div style="border: 1px solid black; padding: 5px; margin-top: 5px;">1) "To the best of our knowledge, there has been no litigation relative to compensation disclosures or practice brought against USI. It is in the nature of a national insurance brokerage business for there to be, from time to time, claims or lawsuits brought by and against the Company about insurance disputes. These matters have been resolved or are being resolved satisfactorily to the Company and have no adverse or material impact on any accounts under consideration." 2) No. 3) No. 4) No. 5) No</div> |
| <b>14</b> | <b>Questions Part 2</b><br>1) Is the Business in arrears in any contract or debt? 2) Has the Business been a defaulter, as a principal, surety, or otherwise? 3) Have liquidated damages or penalty provisions been assessed against the Business for failure to complete work on time or any other reason?<br><div style="border: 1px solid black; padding: 2px; margin-top: 5px;">1) No. 2) No. 3) No.</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

**1**  
**5** State if the Company is a certified minority business enterprise

This company is not a certified minority business

**1**  
**6** Conflict of Interest Disclosure

A form disclosing potential conflicts of interest involving counties, cities, and other local government entities may be required to be filed after January 1, 2006, by vendors or potential vendors to local government entities. The new requirements are set forth in Chapter 176 of the Texas Local Government Code added by H.B. No. 914 of the last Texas Legislature. Companies and individuals who contract, or seek to contract, with the City of Laredo and its agents may be required to file with the City Secretary's Office, 1110 Houston Street, Laredo, Texas 78040, a Conflict of Interest Questionnaire that describes affiliations or business relationships with the City of Laredo officers, or certain family members or business relationships of the City of Laredo officer, with which such persons do business, or any gifts in an amount of \$250.00 or more to the listed City of Laredo officer (s) or certain family members. The new requirements are in addition to any other disclosures required by law. The dates for filing disclosure statements begin on January 1, 2006. A violation of the filing requirements is a Class C misdemeanor. The Conflict of Interest Questionnaire (Form CIQ) may be downloaded from [http://www.ethics.state.tx.us/whatsnew/conflict forms.htm](http://www.ethics.state.tx.us/whatsnew/conflict%20forms.htm). The City of Laredo officials who come within Chapter 176 of the Local Government Code relating to filing of Conflicts of Interest Questionnaire (Form CIQ) include: 1. Mayor 2. Council Members 3. City Manager 4. Members of the Fire Fighters and Police Officers Civil Service Commission. 5. Members of the Planning and Zoning Commission. 6. Members of the Board of Adjustments 7. Members of the Building Standards Board 8. Parks & Leisure Advisory Committee Member, 9. Historic District Land Board Member, 10. Ethics Commission Board Member, 11. The Board of Commissioners of the Laredo Housing Authority 12. The Executive Director of the Laredo Housing Authority 13. Any other City of Laredo decision making board member If additional information is needed please contact Enrique Aldape III, Interim Purchasing Agent at 956-794-1733.

**1**  
**7** Conflict of Interest Questionnaire Form CIQ

For vendor or other person doing business with local governmental entity. This questionnaire reflects changes made to the law by H.B. 1491, 80th Leg., Regular Session. This questionnaire is being filed in accordance with Chapter 176, Local Government Code by a person who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the person meets requirements under Section 176.006(a). By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. See Section 176.006, Local Government Code. A person commits an offense if the person knowingly violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.

**1**  
**8** Conflict of Interest Questionnaire

Vendor is required to submit Conflict of Interest Form for bid to be considered complete. Have you submitted your completed Conflict of Interest Form with your response?

Yes

**1**  
**9** Disclosure Form

For details on use of this form, see Section 4.01 of the City's Ethics Code.

**2**  
**0** This is a

Update to previous submission

**2**  
**1** Question 1. Name of person submitting this disclosure form

Please include First Name, Middle Initial, Last Name and Suffix (if applicable)

Robert S. Bookhammer

**2**  
**2** Question 2. Contract Information

Please include the following: a)Contract or Project Name b)Originating Department

A) FY 25-051 Risk Liability Insurance Coverage - Detox Center 2) Human Resources

2  
3

**Question 3. Name of individual(s) or entity(ies) seeking a contract with the city (i.e. parties to the contract)**

USI Southwest, Inc.

2  
4

**Question 4. List any business entity(ies) that is a partner, parent, subsidiary business entity(ies) of the individual or entity listed in Question 3.**

It applies to my business

2  
5

**Question 4. List any business entity(ies) that is a partner, parent, subsidiary business entity(ies) of the individual or entity listed in Question 3**

If you selected Not Applicable on Question 4, skip this section. If it applies to you, please list the name of partner, parent, or subsidiary business entity(ies) in this section.

USI Insurance Services, LLC - parent

2  
6

**Question 5. List any individuals or entities that will be subcontractors on this contract**

Not Applicable

2  
7

**Question 5. List any individuals or entities that will be subcontractors on this contract**

If you selected Not Applicable on Question 5, please skip this section. If it applies to you, please list subcontractors in this section.

No response

2  
8

**Question 6. List any attorneys, lobbyists, or consultants that have been retained to assist in seeking this contract**

Not Applicable

2  
9

**Question 6. List any attorneys, lobbyists, or consultants that have been retained to assist in seeking this contract**

If selected Not Applicable on question 6, please skip this section. If it applies to you, please list attorneys, lobbyists, or consultants that have been retained to assist in seeking this contract.

No response

3  
0

**Question 7. Disclosure of political contributions**

List any campaign or officeholder contributions made by the following individuals in the past 24 months totaling more than \$100 to any current member of City Council, former member of City Council, any candidate for City Council, or to any political action committee that contributes to City Council elections. a) Any individual seeking contract with the city (Question 3) b) Any owner or officer of entity seeking contract with the city (Question 3) c) Any individual or owner or officer of any entity listed above as partner, parent, or subsidiary business (Question 4) d) Any subcontractor or owner/office of subcontracting entity for the contract (Question 5) e) The spouse of any individual listed in response to (a) through (d) above f) Any attorney, lobbyist, or consultant retained to assist in seeking contract (Question 6)

Not Applicable

3  
1

**Question 7. Disclosure of political contributions**

If you selected Not Applicable on question 7, please skip this section. If it applies to you, please list all contributors in this section.

No response

|                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>3<br/>2</b> | <b>Updates on contributions required</b><br>Information regarding contributions must be updated by submission of a revised form from the date of the submission of this form, up through the time City Council takes action on the contracts identified in response to Question 2 and continuing for 30 calendar days after the contract has been awarded.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>3<br/>3</b> | <b>Question 8. Disclosure of Conflict of Interest</b><br>Are you aware of any fact(s) with regard to this contract that would raise a “conflict of interest” issue under Section 2.01 of the Ethics Code for any City Council member or board/commission member that has not or will not be raised by these city officials?<br><div style="border: 1px solid black; padding: 2px; margin-top: 5px;">I am not aware of any conflict of interest</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>3<br/>4</b> | <b>8. Disclosure of Conflict of Interest</b><br>If you selected I am aware of conflict of interest is question 8, please list them in this section.<br><div style="border: 1px solid black; padding: 2px; margin-top: 5px;">No response</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>3<br/>5</b> | <b>Question 9. Updates Required</b><br>I understand that this form must be updated by submission of a revised form if there is any change in the information before the discretionary contract is the subject of action by the City Council, and no later than five (5) business days after any changes has occurred, whichever comes first. This include information about political contributions made after the initial submission and up until thirty (30) calendar days after the contract has been awarded.<br><input checked="" type="checkbox"/> I have read and understand this section                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>3<br/>6</b> | <b>Question 10. No Contact with City Officials or Staff during Contract Evaluation</b><br>I understand that a person or entity who seeks or applies for city contract or any other person acting on behalf of that person or entity is prohibited from contacting city officials and employees regarding the contract after a Request for Proposal (RFP), Request for Qualifications (RFQ), or other solicitation has been released. This no-contact provision shall conclude when the contract is posted as a City of Laredo Council agenda item. If contact is required with city officials or employees, the contact shall take place in accordance with procedures incorporated into the solicitation documents. Violation of this prohibited contacts provision set out in Section 2.09 of the Ethics Code by respondents or their agents may lead to disqualification of their offer from consideration.<br><input checked="" type="checkbox"/> I have read and understand this section |
| <b>3<br/>7</b> | <b>Question 11. Conflict of Interest Questionnaire (CIQ)</b><br>Chapter 176 of the Local Government Code requires contractor and vendors to submit a Conflict of Interest Form (CIQ) to the Office the of City Secretary.<br><input checked="" type="checkbox"/> I have acknowledge that I have been advised                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>3<br/>8</b> | <b>Question 11. Oath</b><br>Please complete in this section the required information for your company: 1) Name 2) Title 3) Company or DBA 4) Date<br><div style="border: 1px solid black; padding: 2px; margin-top: 5px;">1) Robert S. Bookhammer 2) Senior Vice President 3) USI Southwest, Inc. 4) 6/23/25</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>3<br/>9</b> | <b>Question 12. Oath</b><br>I swear or affirm that the statements contained in this Discretionary Contracts Disclosure Form, including any attachments, to the best of my knowledge and belief are true, correct, and complete.<br><input checked="" type="checkbox"/> I swear or affirm information is correct                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

## Bid Lines

|          |                                                                                                                                                                                                                            |
|----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>1</b> | Notice is hereby given that the City of Laredo is now accepting sealed proposals, subject to the Terms and Conditions of this invitation for Proposals and other contract provisions, for Liability Insurance Proposals to |
|----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

respond to the exposures presented by the operation of the Detoxification Facility.

## GENERAL REQUIREMENTS AND INSTRUCTIONS

A. INTRODUCTION The City of Laredo, located in far southwest Texas, began operating a twenty-four (24)-bed in-patient detoxification facility on or about October 1, 2023, for the benefit of its residents. It is known as Roots Recovery Center.

B. PURPOSE The City of Laredo is seeking insurance proposals for the City to respond to the exposures presented by the detoxification facility. This RFP process is restricted to this part of the City's exposure. It does not include any other part of the City's operations or exposures.

### C. NOTICE

1. The City reserves the right to accept or reject, in part or in whole, any portion of the proposal program when, in its judgment, such action is deemed necessary and in its best interests. The City also reserves the right to waive or dispense with any of the formalities contained herein.

2. Each proposer is asked to submit quotations on the basis of the specifications contained herein. The City will consider alternative quotations, provided the alternatives are clearly explained. All deviations from the specifications must be clearly identified and explained in the applicable proposal form.

3. The underwriting information contained herein is believed to be accurate and up to date but is not intended to be an express or implied warranty.

### D. TIMETABLE

1. The specifications, including Market Request Forms, will be available for proposers at 10:30 a.m., on Thursday, April 10, 2025, at the Finance Department, Purchasing Division, 5512 Thomas Avenue, Laredo, Texas, or by downloading from the City's website (Cit-E-Bid): <https://cityoflaredo.ionwave.net/SourcingEvents.aspx?SourceType=1>.

2. Market request forms are included in this document. These forms must be completed and e-mailed to RWL Group on or before Friday, April 11, 2025 (information in E. Communication). A copy of this form must also be sent to Ms. Karla Robles at the City.

3. RWL Group will begin to assign markets on Monday, April 14, 2025.

4. Each proposal will be received at the Office of the City Secretary, 1110 Houston Street, 3rd Floor, Laredo, Texas, until 5:00 p.m. on Wednesday, June 25, 2025. The proposals must be in a sealed envelope and clearly labeled FY25-051 RFP Risk Liability Coverage for the Roots Recovery Center. Proposals can be submitted electronically through Cit-E-Bid by going to: <https://cityoflaredo.ironwave.net/login.aspx>. **PROPOSALS SENT BY USPS, FED EX, UPS, ETC. WILL NOT BE CONSIDERED.**

7. The cutoff date for questions is Friday, June 6, 2025, questions can be submitted electronically through Cit-E-Bid.

8. The sealed envelopes will be opened on Thursday, June 26, 2025.

9. Interviews with brokers, if required, will be conducted either Tuesday July 1, 2025 or Wednesday, July 2, 2025.

10. The successful proposer will provide coverage binders by no later than August 1, 2024.

11. Coverage is to be effective as of August 1, 2025.

12. The successful proposer will deliver insurance policies to Ms. Karla Robles by no later than the end of October 2025.

### E. COMMUNICATION

1. Proposers will direct any requests for information, written or otherwise, to:

Carolyn A. Miller  
RWL GROUP  
300 N. Coit Road, Suite 810  
Richardson, Texas 75080-5456  
Austin Office: 15201 Lucian Street, Austin, TX 78725  
PHONE: 972-907-9095 or 512-904-0048; E-mail: [carolyn@rwlgroup.com](mailto:carolyn@rwlgroup.com)

2. Ms. Karla Robles will represent the City relative to all matters pertaining to these specifications and contracts in conjunction therewith. Inspections may be coordinated through Ms. Robles, who can be contacted as follows:

Ms. Karla Robles  
Risk Management Manager  
City of Laredo HR Department, Risk Management Division  
1102 Bob Bullock Loop  
Laredo, TX 78043  
PHONE: 956-727-6481 FAX: 956-727-6485

## F. PROPOSALS

1. Proposals are to be clearly explained and identified. The proposal specifications contain proposal forms (Attachment A). These forms must be completed by the proposer and attached to the proposal. Unless otherwise stated, all blank spaces on the proposal page(s), applicable to subject specifications, must be completed correctly. All costs, including optional programs, must be clearly stated and summarized. Exceptions or deviations from the specifications must be specifically identified in the Exception Form contained herein. Failure to follow these instructions may be grounds for disqualification of your proposal.

**NOTE — If no exceptions are listed in the Exception Form at the end of each section, it will be understood that the proposal contemplates coverage. Also, it is mandatory that all proposers list on the Exception Forms any material restriction of coverage that may be proposed by insurers. The Exception Form should be used to list any specifications that cannot be complied with for legal reasons.**

2. Proposers may withdraw their proposals at any time before the closing of proposal acceptance. However, no proposal can be withdrawn or canceled after the closing of proposal acceptance.

3. If any person who contemplates submission of a proposal is in doubt as to the true meaning of any part of these specifications, he or she may submit a written request for interpretation thereof to RWL Group. The decision of RWL Group will be final. Oral explanations will not be binding. Requests for additional information must be made in writing to RWL Group (either by mail or e-mail), not later than Friday, June 6, 2025, with a copy to Karla Robles at the City of Laredo.

4. The City will accept one of the proposals, or a combination of several parts of more than one of the proposals, or reject all proposals as soon as possible after the time for close of proposals.

## G. QUALIFICATIONS

### 1. AGENT:

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

- a) The agency must have agent's errors and omissions insurance with a limit of at least \$1,000,000 per-occurrence. A certificate evidencing coverage must be included with the proposal.
- b) The agency must have been in business for at least ten (10) years.
- c) The agency must assign at least one qualified account representative to service CITY OF LAREDO. This representative should have at least ten (10) years of experience in public entity property and casualty lines. Please include the resumes of all proposed account representatives in the proposal.

### 2. INSURER:

- a) Although proposals will be accepted from carriers regardless of their A.M. Best rating (or whether or not they are rated), more favorable consideration will be given to those proposals submitted by carriers with ratings of at least A-: VII edition from A.M. Best. Each agent must show an A.M. Best rating for each insurer that is submitting a proposal.
- b) Insurers shall be duly licensed, or approved non-admitted carriers, and comply with all applicable state insurance laws and requirements, or duly constituted applicable insurance regulatory authorities.
- c) Local claims, underwriting, and engineering capabilities will be considered a plus. If independent servicing firms are to be used for claims or safety engineering services, their names and addresses must be shown.
- d) Quotations will be accepted from intergovernmental risk sharing pools and risk retention groups organized in accordance with Article 4413 (32c), Texas Interlocal Cooperation Act. Proposals from such sources must include a current financial statement (balance sheet and statement of operations) and the most recent audited financial statements, including the auditor's opinion, plus complete particulars about its reinsurance programs.

## H. ASSIGNMENT OF MARKETS (Does Not Apply To Direct Writers)

- 1. A market allocation procedure is applicable only to situations when more than one agent wants to obtain quotes from the same insurance group. The City reserves the right to assign the use of any given insurance carrier with respect to this insurance to a specific agent or broker to avoid multiple contacts with a single insurance underwriter. Your cooperation is asked in helping obtain as wide a representation of potential insurers as is presently possible through the following method:
- 2. Each agent (or company) participating in the proposal process is asked to submit an initial list of insurers with which he/she would like to work in preparing proposals for the requested programs. **This list should be ranked in order of preference.** A "Market Request Form" is attached for this purpose.
- 3. The Market Request Form should be completed and sent via e-mail to Carolyn Miller at RWL Group on or before Friday April 11, 2025. A copy of this form should also be sent to Karla Robles at the City of Laredo.
- 4. RWL Group will begin assigning markets on Monday, April 14, 2025, based on the requests received at that time. **Agents must not reserve any markets prior to receiving a confirmation of market assignments.**
- 5. Insurance markets will be assigned in accordance with the following principles:



a) All market awards will endeavor to follow the requests in the order of priority indicated by the agent. At the discretion of the City and RWL Group, the order of choice between agents requesting the same markets will be determined by the order in which the Market Request Forms are received by RWL Group, as well as the order of preference included on the individual Market Request Form.

b) Requests for insurance markets received after the date indicated will be honored only to the extent that such companies have not previously been requested and assigned.

6. No more than one agent may contact any one insurance group. To assist us in achieving this, all requests for carriers that are part of a group should be made in the name of the group **and not the individual carrier**.

Market requests for other than insurance companies or groups will not be acceptable; for example, if the company is National Union, please show your choice as AIG Group. Refer to Section II, "General Underwriting Requirements", Item 5, with regard to non admitted carriers that may be part of a group. Do not list the individual carrier or intermediary. **Failure to follow these rules may result in disqualification of your proposal.**

7. The City reserves the right to assign additional markets, if not in conflict with previous assignments, as may be appropriate. If additional markets are desired, the agent must secure prior approval from RWL Group before approaching said markets. Additional markets must be requested in writing and must not be contacted or reserved without approval from RWL Group. Failure to follow these rules may result in disqualification of your proposal. Supplemental market request should be submitted on or before Tuesday, April 15, 2025. Supplemental markets will be assigned on Wednesday, April 16, 2025.

8. If full insurance coverage will not be provided by one insurer, the percentage of the amount of coverage to be provided by each insurer must be shown.

9. If RWL Group or the City feels that all viable markets have not been approached, all vendors will be sent a listing of these additional markets. Each vendor will be permitted to choose one additional market from this list on a first-come, first served basis, via a faxed, written or e-mailed request.

#### I. SELECTION CRITERIA

The City reserves the right to award the subjects of the proposal, in whole or in part, to those proposers who demonstrate professional competence in submitting proposals that satisfy cost, coverage, and servicing criteria. Insurance proposals will be carefully evaluated in terms of cost effectiveness and coverage, and for compliance with the insurance, risk financing, and servicing criteria as contained in the specifications. The insured will consider the merits of each proposal, whether on a consolidated or fragmented basis.

#### J. SERVICING CRITERIA

The City strongly desires to receive personalized and timely professional risk management services of the highest professional quality from the selected proposer. Proposers who demonstrate the professional capability, expertise, and experience in handling an account the size of the City will receive favorable consideration. Servicing criteria will be evaluated in terms of such considerations as:

1. Number of years in business
2. Size of agency and staff
3. Experience of staff
4. Professional servicing capability: i.e., loss control, claims management, information storage systems, underwriting, exposure and hazard identification, etc.
5. Capability and willingness of agency resources to personally respond to the professional needs of the insured in a timely manner.
6. Technical skills of staff with respect to insurance coverages and knowledge of certain internal risk management administrative considerations (insurance budgets, premium allocations, contractual risk transfer, legal trends, etc.).

Appropriate emphasis will be placed on these considerations with respect to the evaluations of the insurance proposals.

Each proposer is asked to submit a written addendum to his/her proposal which responds to this section, "Servicing Criteria", and which specifically identifies the names of personnel who will be responsible for servicing the City. The written addendum should include the qualifications and experiences of account executive personnel and technical support persons who will be directly responsible for servicing the City. A proposed plan should be clearly explained as to how you intend to deliver the requested services in a personalized and timely manner.

**Please use the Servicing Criteria Form which appears at the end of Section I for responding to this item.**

#### K. DISQUALIFICATION AND REJECTION OF PROPOSALS

Failure to comply with the requirements or the procedures or to satisfy the insurance and servicing criteria as set forth in the specifications, may result in either disqualification of the proposer, rejection of the insurance proposal or other remedial action deemed appropriate at the sole discretion of the City. **It is not intended that**

**technical exceptions to the specifications will, in and of themselves, disqualify proposers, unless the exceptions are deemed to be material. The City reserves exclusive right to make determination as to what is or is not material.** The City reserves the right to reject a proposer if the proposer is in arrears on existing contracts or City taxes.

**L. LEGAL**

All proposers are expected to comply with all federal, state, and local insurance laws and regulations relative to the preparation and submission of insurance proposals. All proposals that are submitted will be presumed to be in compliance with all applicable laws.

**M. AUTHORIZED SIGNATURE**

All proposal forms must be signed by persons who have the legal authority to bind the insurer to the insurances that are proposed.

**N. FEES AND COMMISSIONS**

Each agent must attach a schedule of commissions, by line of coverage, expressed as a unit price or percentage of premium. In addition, as an alternative, each agent is requested to make a fee proposal and quote all coverages net of commission. A specimen contract for services is requested with respect to a "fee" payment methodology in lieu of commission.

**Response Total: 0**