6-2. ACTION:
Resolution 2025-005

Captive Insurance Broker Request for Proposals

California Vanpool Authority

AGENDA ITEM 6-2.
May 8, 2025
Presented by:
Georgina Landecho, CVA Executive Director

SUBJECT:

ACTION: Approval of Resolution 2025-005 Captive Insurance Broker Request for Proposals

BACKGROUND:

In 2011, staff recognized the need for self-insurance. Below is a brief explanation of captive insurance, outlining its purpose and benefits.

At the CalVans Board Meeting April 11th, 2024, the CalVans Board of Directors passed Resolution 24-007 for Actuarial and Captive related services from Willis Towers Watson Management (WTW) in the development of the new captive insurance company.

At the CalVans Board Meeting June 13th, 2024, meeting the CalVans Board of Directors approved Kutak Rock, a law firm leading in the development of Captive Insurance and Regulatory Compliance law in the U.S..

CalVans has a long history with Philadelphia Insurance Company (PHLY), a professional liability insurance designed for niche markets. Pacific Ag Insurance Agency, Inc., in collaboration with PHLY, WTW, and Kutak Rock understood the unique needs and priorities of CalVans. The creation of the captive insurance, Tenet Assurance, was incepted on December 24, 2024.

At the CalVans Board meeting on February 13, 2025, the CalVans Board of Directors passed Resolution 2025-001, approving the transfer of captive managing partners to Husch Blackwell. This transition ensured continuity by retaining the attorneys who played a key role in forming the captive, Mr. McNichol and Ms. Cycholl, as they continue to represent Tenet Assurance.

What is Captive Insurance?

Captive insurance is a form of self-insurance in which a company—or, in the case of CalVans, a government agency—establishes its own insurance entity, known as a 'captive,' to provide tailored coverage that meets its specific needs. This model enables CalVans to retain and manage agency risks rather than relying solely on traditional commercial insurance providers. Captive insurance offers several advantages, including cost savings, enhanced risk management, access to reinsurance markets, and the flexibility to customize coverage that aligns with CalVans' unique operational requirements. Tenet Assurance is the CalVans captive.

Key features of captive insurance include:

1) **Ownership and Control**: CalVans owns Tenet Assurance, providing the agency with full control over its insurance operations and risk management strategies. This ownership allows CalVans to tailor its insurance approach to meet its unique needs while ensuring financial stability and effective risk mitigation.
    - **Tailored Coverage:** Tenet Assurance was designed to fit CalVans' specific risk profile, covering unique or emerging risks that may not be available in the traditional market.
    - **Claims Management:** CalVans has full control over the claims process, with management by our third party administrator, Willis Towers Watson, which leads to faster resolutions and better management of claims costs.
2) **Risk Management**: Tenet Assurance allows CalVans to tailor insurance coverage for specific risk and risk tolerance levels, providing more flexibility than standard commercial insurance policies.
    - **Enhanced Loss Prevention**: Proactive approach to risk management, leading to fewer claims and lower overall risk.

- **Access to Reinsurance**: The captive provides direct access to the reinsurance market, often at more favorable terms than those available to individual companies.

3) **Cost Savings**: Tenet Assurance helps CalVans grow our bottom line in several ways:
   - **Stable Pricing**: More predictable insurance costs, protecting against sudden premium hikes.
   - **Underwriting Profits**: Underwriting profits generated remain within the captive, benefiting CalVans.
   - **Investment Income**: Premiums can be invested, generating additional income for CalVans.
   - **Lower Premiums**: Reduced insurance premiums by eliminating commercial insurance carrier margins.
   - **Financial Stability**: Stable costs over time, contribute to better financial planning and stability.
   - **Competitive Advantage**: Cost savings free up capital for other strategic goals.
4) **Tax Benefits**: CalVans is tax exempt
5) **Access to Reinsurance Markets**: Captives can access reinsurance markets directly, allowing them to spread risk and potentially reduce overall insurance costs.

FISCAL IMPACT:

The last RFP for a captive Insurance broker was 5 years ago and is now due for a review. Staff received notices of potential increases and has allocated accordingly for the FY 25/26 proposed budget.

RECOMMENDED ACTION:

CalVans is recommending adoption of Resolution 2025-005 Captive Insurance Broker Request for Proposals (RFP) to solicit the most competitive rate for brokerage services.

ATTACHMENT(S):

1. Exhibit A: Resolution 2025-005 Captive Insurance Broker Request for Proposals (RFP)

CALIFORNIA VANPOOL AUTHORITY

RESOLUTION NO. 2025-005
RESOLUTION FOR REQUEST FOR PROPOSALS FOR CAPTIVE INSURANCE BROKER

CERTIFIED COPY of a resolution duly passed by the board of directors of the California Vanpool Authority on the 8th day of May 2025.

At a meeting of the Board of Directors of the California Vanpool Authority held on the 8th day of May 2025, during a regular meeting of the California Vanpool Authority, d.b.a. CalVans, a quorum of the said board was present and on motion the following resolution was duly passed by said board:

RESOLVED that the now created captive insurance, Tenet Assurance, formed in the State of Arizona, does hereby authorize the Chairman of the CalVans Board, under the corporate seal of the California Vanpool Authority to appoint the Board Secretary and Agency Executive Director to solicit a Request for Proposal (RFP) for a captive broker.

RESOLVED that the California Vanpool Authority does hereby authorize the President of Tenet Assurance, or authorized designee; under the corporate seal of Tenet Assurance, to execute the vetting process for RFP bidder qualifications for a captive broker; and it is further

RESOLVED that the California Vanpool Authority does hereby authorize the President and Secretary, under the corporate seal of Tenet Assurance, to amend, correct, engage and select the winning bid following the RFP Schedule of Events before the June 12, 2025, Board meeting.

NOW, THEREFORE, BE IT RESOLVED that the Board of Directors approves the acceptance of RFP 2025-005 to search of a captive insurance broker to represent CalVans during the next 5 year period, subject to terms and condition outlined in the RFP.

On a motion by Director _____, seconded by Director _____, the foregoing Resolution was passed and adopted by the Board of Directors of the California Vanpool Authority this 8th of May 2025, by the following vote, to wit:

AYES: _____ NOES: _____ ABSTAIN: _____ ABSENT: _____

_____

Robert Poythress, Chairperson,
Board of Directors, California Vanpool Authority

Chair of the California Vanpool Authority, a Joint Powers Authority, a public transit agency existing under the authority of California Government Code § 6500 et seq.

IN WITNESS WHEREOF, I have set my hand on this 8th day of May 2025. I, Georgina Landecho, Secretary of the CalVans Board of Directors, do hereby certify that the foregoing is a full, true, and correct copy of a resolution passed and adopted by the CalVans Governing Board at its regularly called and conducted meeting held on May 8th, 2025.

_____

Georgina Landecho, Executive Director & Secretary
Board of Directors, California Vanpool Authority

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EXHIBIT A

INSTRUCTIONS TO BIDDERS

It is the responsibility of each "Bidder" to:

- Follow the format required in the RFP when preparing your response. Provide point-by-point responses to all sections in a clear and concise manner.
- Provide complete answers/descriptions. Read and answer all questions and requirements. Don't assume the AGENCY or evaluation committee will know what your company capabilities are or what items/services you can provide, even if you have previously contracted with the AGENCY. The proposals are evaluated based solely on the information and materials provided in your response.
- Submit your response on time. Note all the dates and times listed in the Schedule of Events and within the document and be sure to submit all required items on time. Late proposal responses will not be accepted.

The following items MUST be included in the response to be considered responsive.
Failure to include any of these items may result in a non-responsive determination.

- Signed Cover Sheet
- Signed Addenda (if appropriate)
- Point-by-Point response to all sections and subsections

SCHEDULE OF EVENTS

Event	Date of Event
RFP Issue Date	May 09, 2025
Deadline for Receipt of Written Questions	May 16, 2025
Deadline for Response of Written Answers	May 21, 2025
RFP due at 1:30 p.m. at 8444 W. Doe Avenue	May 23, 2025
Formal Award of Contract at CalVans Regular Board Meeting	June 12, 2025

SECTION 1: PROJECT OVERVIEW AND INSTRUCTIONS

1.0. BACKGROUND

CalVans, a Joint Powers Agency oversees the operation of the California Vanpool Authority. The Authority is located at 8444 W. Doe Avenue, Visalia, California 93921 with offices in El Centro, Santa Paula, Nipomo, King City and Saint Helena. **CalVans** oversees the operation of over 800 vehicles operated as vanpools throughout the 34 counties served by the **CalVans** program.

CalVans Policy Board is made up of 11 members representing county or regional planning agencies in areas served by **CalVans**. Each member appoints one of its members to sit on the **CalVans** board. The Board has final decision on all agency direction and policy.

1.1. DISADVANTAGED BUSINESS PARTICIPATION AND EQUAL OPPORTUNITY PROVISIONS

California Vanpool Authority has adopted a Disadvantaged Business Enterprise (DEB) Program. The DBE program was adopted to ensure that small, disadvantaged firms have an equal opportunity to participate in the AGENCY FTA projects. The term "Disadvantage Business" means approval by the State of California as a certified DBE whose management and daily business operations are controlled by one or more of the socially and economically disadvantaged individuals who own it.

Disadvantaged firms are encouraged to submit proposals as prime contractor for this project. Price alone will not be an acceptable basis for rejecting DBE proposals as prime contractors or subcontractors on this project unless it is determined that a reasonable price cannot be obtained from a DBE.

1.2. DEFINITION OF TERMS

- "RFP" means the Request for Proposal process
- "AGENCY" means California Vanpool Authority
- "Board" means the Board of California Vanpool Authority
- ""Offeror"", "Bidder", "Vendor", "Supplier", "Consultant", "Contractor" and "Subrecipient" are used interchangeably throughout this invitation to mean the person, firm, or corporation or other entity submitting a Bid in response to the Request for Bid.
- "Bid" and "Proposal" are used interchangeably to mean an individual's or entity's offer in response to this Request for Proposal.

1.3. PROJECT OVERVIEW

CalVans is seeking the services of a qualified Captive Insurance Broker to secure insurance coverage renewals for the agency's fleet vehicles, facilities and employees. The Insurance needs of the agency range from vehicle insurance to Workman's Compensation coverage and include the following:

Vehicle coverage including comp, collision and uninsured motorists

- Non-Profit Package with D&O, EPL, Prop, GL, Excess & Fidelity
- Professional E&O, EPL, PKG, Fidelity
- Property Managers E&O, EPL, Pkg, Excess
- Workers' Compensation
- BOP/Package with Excess/Umbrella
- Contractors
- Cyber Liability
- Garage Auto Dealer & Garage Auto Repair

1.4. CONTRACT TERM

The contract term is for a period of five (5) years beginning upon signing of an agreement and ending five (5) years from that date. Renewals of the agreement, by mutual agreement of both parties, may be made at one (1) year intervals, or any interval that is advantageous to the AGENCY.

1.5. SINGLE POINT OF CONTACT

From the date this Request for Proposal (RFP) is issued until an "Bidder" is selected and the selection is announced by the procurement officer, the procurement officer in charge of this solicitation. Any unauthorized contact may disqualify the "Bidder" from further consideration. Contract information for the single point of contact is as follows:

Procurement Officer:	Georgina Landecho
Address:	**CalVans** 8444 W. Doe Avenue Visalia, CA 93291
Telephone Number	(866) 655-5444 ext. 101
E-mail Address:	glandecho@calvans.gov

1.6. REQUIRED REVIEW

1.6.1. REVIEW RFP. "Bidders" should carefully review the instructions, mandatory requirements, specifications, standard terms and conditions and promptly notify the procurement officer identified above in writing or via e-mail of any ambiguity, inconsistency, unduly restrictive specification, or error which they discover upon examination of this RFP. This should include any terms or requirements within the RFP that either preclude the "Bidder" from responding to the RFP or add unnecessary cost.

This notification must be accompanied by an explanation and suggested modification and be received by the deadline for receipt of written or e-mail inquiries set forth below. The AGENCY will make any final determination of changes to the RFP.

1.7. GENERAL REQUIREMENTS

1.7.1. UNDERSTANDING OF SPECIFICATIONS AND REQUIREMENTS. By submitting a response to this RFP, "Bidder" agrees to an understanding of and compliance with the specifications and requirements described in this RFP.

1.7.2. PRIME CONTRACTOR/SUBCONTRACTORS. This highest scoring "Bidder" will be the prime contractor, if a contract is awarded, and shall be responsible, in total, for all work of any subcontractors. All subcontractors, if any, must be listed in the proposal. The AGENCY reserves the right to approve all subcontractors. The Contractor shall be responsible to the AGENCY for the acts and omissions of all subcontractors or agents and of persons directly or indirectly employed by such subcontractors, and for the acts and omissions of persons employed directly by the Contractor. Further, nothing contained within this document, or any contract documents created as a result of any contract award derived from this RFP shall create any contractual relationships between any subcontractor and the AGENCY.

1.7.3. "BIDDERS" SIGNATURE. The proposals must be signed in ink by an individual authorized to legally bind the business submitting the proposal. The "Bidder's" signature on a proposal in response to this RFP guarantees that the offer has been established without collusion and without effort to preclude the AGENCY from obtaining the best possible supply or service. Proof of authority of the person signing the RFP response must be furnished upon request.

1.7.4. OFFER IN EFFECT FOR 120 DAYS. A proposal may not be modified, withdrawn or canceled by the "Bidder" for a 120-day period following the deadline for proposal submission as defined in the Scheduled of Events, or receipt of best and final offer, if required, and "Bidder" so agrees in submitting the proposal.

1.8. SUBMITTING A PROPOSAL

1.8.1. ORGANIZAION OF PROPOSAL. "Bidder's" must organize their proposal into sections that follow the format of this RFP, with tabs separating each section.

"(Bidder's Name)" understands and will comply.

A "Bidder" making the statement "Refer to our literature…" or "Please see www….com" may be deemed non-responsive or receive point deductions. If making reference to materials located in another section of the RFP response, specific page numbers and sections must be noted. Staff evaluating the bid, should not be required to search through external literature or another section of the proposal to find a response. Please use hyperlinks within the document to facilitate review.

1.8.2. FAILURE TO COMPLY WITH INSTRUCTIONS. "Bidders" failing to comply with these instructions may be subject to point deductions. The AGENCY may also choose to not evaluate, may deem non-responsive, and/or may disqualify from further consideration any proposals that do not follow this RFP format, are difficult to understand, are difficult to read or are missing any of the requested information.

1.8.3. PRICE SHEET. "Bidder" must respond to this RFP by providing a fee schedule with a fixed fee for the work contemplated on the project.

1.8.4. COPIES REQUIRED AND DEADLINE FOR RECEIPT OF PROPOSALS. "Bidders" must submit one (1) mailed or delivered original proposals along with one (1) electronic version to **CalVans**. Proposals must be sealed and labeled on the outside of the package "RFP No. 05.09.2025, Sealed Proposal – Insurance Broker Services." **Proposals must be received at 8444 W. Doe Avenue, Visalia, CA 93291 prior to 1:30 PM, May 23, 2025. Facsimile responses WILL NOT be accepted.**

1.8.5. LATE PROPOSALS. Regardless of cause, late proposals will not be accepted and will automatically be disqualified from further consideration. It shall be the "Bidder's" sole risk to assure delivery at the reception desk at the designated office by the designated time. Late proposals will not be opened and may be returned to the "Bidder" at the expense of the "Bidder" or destroyed if requested.

1.8.6. ADDRESSING OF PROPOSALS. Proposals MUST be delivered in a sealed package and marked as shown below:

RFP No. 05.09.2025
SOLICITATION FOR CAPTIVE BROKER SERVICES
California Vanpool Authority
8444 W. Doe Avenue
Visalia, CA 93291

Proposals that are not submitted in a sealed package, with the Request for Proposal Number clearly labeled on the outside WILL BE DISQUALIFIED.

1.9.0. COST OF PREPARING A PROPOSAL

1.9.1. AGENCY NOT RESPONSIBLE FOR PREPARATION COST. The cost for developing and delivering responses to this RFP and any subsequent presentations of the proposal as requested by the AGENCY are entirely the responsibility of the "Bidder." The AGENCY is not liable for any expense incurred by the "Bidder" prior to execution of a contract.

1.9.2. ALL TIMELY SUBMITTED MATERIALS BECOME AGENCY PROPERTY. All materials submitted in response to this RFP become the property of the AGENCY and are to be appended to any formal documentation, which would further define or expand any contractual relationship between the AGENCY and "Bidder" resulting from this RFP process.

SECTION 2: RFP STANDARD INFORMATION

2.0. "BIDDER" COMPETITION

The AGENCY encourages free and open competition among "Bidders." Whenever possible, the AGENCY will design specifications, proposal requests, and conditions to accomplish this objective, consistent with the necessity to satisfy the AGENCY's need to procure technically sound, cost-effective services and supplies.

2.1. RECEIPT OF PROPOSALS AND PUBLIC INSPECTION

2.1.1. PUBLIC INFORMATION. The proposals received shall become the property of California Vanpool Authority and are subject to public disclosure. Proposal prices and information submitted by proposers will be made available to proposers after Board has approved award of contract. Proposers are to indicate any restrictions on the use of data contained in their responses. Those parts of a proposal which are defined by the proposer as business or trade secrets, as that term is defined in California Government Code, Section 6254.7, and are reasonably marked as "Trade Secrets", "Confidential" or "Proprietary" shall only be disclosed to the public if such disclosure is required or permitted under the California Public Records Act or otherwise by law. Proposers who indiscriminately and without justification identify most, or all, of their proposal as exempt from disclosure may be deemed non-responsive.

2.1.2. PROCUREMENT OFFICER REVIEW OF PROPOSALS. Upon opening the proposals received in response to this RFP, the procurement officer in charge of the solicitation will review the proposals and separate out any information that meets the referenced exceptions in Section 2.1.1 above, providing the following conditions have been met;

- Confidential information is clearly marked, highlighted, and separated from the rest of the proposal.
- The proposal does not contain confidential material in the cost or price section.

Information separated out under this process will be available for review only by the procurement officer, the evaluation committee members, and limited other designees. "Bidders" must be prepared to pay all legal costs and fees associated with defending a claim for confidentiality in the event of a "right to know" (open records) request from another party.

The claim of a trade secret must be reasonable. If materials or information are included in a request for trade secret coverage that are not reasonable considered a "trade secret," the proposal will be rejected as non-responsive and will not be considered. In such cases, an "Bidder" will not be given an opportunity to revise the proposal.

2.2. CLASSIFICATION AND EVALUATION OF PROPOSALS

2.2.1. INITIAL CLASSIFICAITON OF PROPOSALS AS RESPONSIVE OR NON-RESPONSIVE. All proposals will initially be classified as either "responsive" or "non-responsive." Proposals may be found non-responsive at any time during the procurement process if any of the required information is not provided; the submitted price is found to be excessive or inadequate as measured by criteria stated in the RFP; or the proposal is not within the plans and specifications described and required in the RFP. If a proposal is found to be non-responsive, it will not be considered further.

2.2.2. DETERMINATION OF RESPONSIBILITY. The procurement officer will determine whether an "Bidder" is responsible and that the prices are reasonable. "Bidder's" may be asked to provide any information required to determine the responsibility of the "Bidder".

2.2.3. EVALUATION OF PROPOSALS. The evaluation committee will evaluate the remaining proposals and recommend whether to award the contract to the highest scoring "Bidder" or, if necessary, to seek discussion/negotiation or a best and final offer in order to determine the highest scoring "Bidder." All responsive proposals will be evaluated based on stated evaluation criteria. In scoring against stated criteria, the AGENCY may consider such factors as accepted industry standards and a comparative evaluation of all

other qualified RFP responses in terms of differing price, quality, and contractual factors. These scores will be used to determine the most advantageous offering to the AGENCY.

2.2.4. COMPLETENESS OF PROPOSALS. Selection and award will be based on the "Bidder's" proposal and other items outlined in this RFP Submitted response may not include references to information located elsewhere, such as Internet websites or libraries, unless specifically requested. Information or materials presented by "Bidders" outside the formal response or subsequent discussion/negotiation or "best and final offer," if requested, will not be considered, will have no bearing on any award, and may result in the "Bidder" being disqualified from further consideration.

2.2.5. BEST AND FINAL OFFER. The "Best and Final Offer" is an option available to the AGENCY under the RFP process, which permits the AGENCY to request a "best and final offer" from one or more "Bidder's" if additional information is required to make a final decision. "Bidder's" may be contacted asking that they submit their "best and final offer," which must include any and all discussed and/or negotiated changes. The AGENCY reserves the right to request a best and final offer for this RFP, if any based on price/cost alone.

2.2.6. EVALUATOR/EVALUATION COMMITTEE RECOMMENDATION FOR CONTRACT AWARD. The evaluator/evaluation committee will provide a written recommendation for contract award to the procurement officer that contains the scores justification and rationale for its decision. The procurement officer will review the recommendation to ensure its compliance with the RFP process and criteria before concurring in the evaluator's recommendation of the responsive and responsible "Bidder" that achieves the highest score and is, therefore, the most advantageous to the AGENCY.

2.2.7. REQUEST FOR DOCUMENTS NOTICE. Upon concurrence with CalVans Board recommendations, the procurement officer will issue a "Request for Documents Notice" to the highest scoring "Bidder" to obtain the required documents/information, such as insurance documents and/or best and final offer, and any other necessary documents. Receipt of the "Request of Documents Notice" does not constitute a contract and **no work may begin until a contract signed by all parties is in place**. The procurement officer will NOT notify other "Bidders" of the AGENCY's selection, until after the June 12th,2025 Board Meeting.

2.2.8. CONTRACT EXECUTION. Upon receipt of all required materials requested in the "Request for Documents Notice," a formal contract utilizing the contract attached as **Attachment D** and incorporating the **Standard Terms and Conditions** Attached as **Attachment A**, as well as the highest scoring "Bidder's" response to the RFP will be provided to the highest scoring "Bidder" for signature. The highest scoring "Bidder" will be expected to accept and agree to all material requirements contained in the contract as set out in **Appendices A and B** of this RFP. If the highest scoring "Bidder" does not accept all material requirements, the AGENCY may move to the next highest scoring "Bidder" or cancel the RFP. Work under the contract may begin when the contract is fully executed i.e., when the contract is signed by all parties.

2.3. AGENCY'S RIGHTS RESERVED

While the AGENCY has every intention to award a contract as a result of this RFP, issuance of the RFP in no way constitutes as a commitment by the AGENCY to award and execute a contract. Upon a determination such actions would be in its best interest, the AGENCY, in its sole discretion, reserves the right to:

- Cancel or terminate this RFP.
- Reject any or all proposals received in response to this RFP.
- Waive any undesirable, inconsequential, or inconsistent provisions of this RFP which would not have significant impact on any proposal.
- Not award if it is in the best interest of the AGENCY not to proceed with contract execution
- If awarded, terminate any contract if the AGENCY determines adequate funds are not available.

SECTIONS 3: SCOPE OF WORK

3.0. OVERVIEW

The "AGENCY" is seeking a qualified insurance broker to provide assistance in securing a broad range of insurance coverage on an ongoing basis. The successful broker needs to demonstrate that they can secure cost effective insurance that fits the needs of the agency on an ongoing basis.

3.1. WORK TASK

The selected "Bidder" will solicit insurance proposals for insurance coverage on an annual basis.

3.2. REPORTS

The successful "Bidder" will provide responding documents in an acceptable retrievable format program. All work task submissions will be compatible with the AGENCY's word processing, publishing, and spreadsheet programs: Microsoft Word, Excel, or Adobe format.

SECTION 4: "BIDDER" QUALIFICATIONS

4.0. AGENCY'S RIGHT TO INVESTIGATE AND REJECT

The AGENCY may make such investigations as deemed necessary to determine the ability of the "Bidder" to provide the supplies and/or perform the services specified. The AGENCY reserves the right to reject any proposal if the evidence submitted by, or investigation of, the "Bidder" fails to satisfy the AGENCY that the "Bidder" is properly qualified to carry out the obligations of the contract. This includes the AGENCY's ability to reject the proposal based on negative references including insolvency and/or a lack of verifiable experience.

4.1. "BIDDER" QUALIFICATION/INFORMATIONAL REQUIREMENTS

In determining the capabilities of an "Bidder" to perform the services specified herein, the following information requirements must be met by the "Bidder". The response, "("Bidder's" Name) understands and will comply" is not appropriate for this section. **(Note: Each item must be thoroughly addressed. "Bidder's" taking exception to any requirements listed in this section may be found non-responsive or be subject to point deductions.)**

4.1.1. REFERENCES. "Bidder" shall provide references that can provide information on their quality of services performing similar projects during the past two (2) years.

4.1.2. RESUMES/COMPANY PROFILE AND EXPERIENCE. "Bidder" shall specify how long the individual/company submitting the proposal has been in the business of providing services similar to those requested in this RFP and under what company name, ease of website use, along with a record of accomplishments of transit related or similar projects. A resume or summary of qualifications, work experience, education, skills, etc., which emphasized previous experience in this area should be provided for all key personnel who will be involved with any aspects of the contract.

4.1.3. UNDERSTANDING OF AGENCY'S TRANSIT SYSTEMS. "Bidder" should provide a description of their understanding of work tasks as outlined in Section 1.3. & 3.1., as it pertains to the AGENCY'S program.

SECTION 5: PRICE PROPOSAL

5.0. PRICE PROPOSAL

The Price Proposal shall be provided under separate, sealed cover as a part of the RFP submittal.

"Bidders" should review the requirements of this RFP and address all services in their fee schedule that might reasonably be expected to support the project. Indicate how the AGENCY will be invoiced for services.

The price proposal submitted under separate, sealed cover, along with the proposed project approach, will be used as a basis for any contract negotiations. The actual scope of services and fees included in the contract may be negotiated and may vary to satisfy the AGENCY's actual needs.

5.1. CONFLICT OF INTEREST

"Bidder" shall disclose any financial, business or other relationship with the AGENCY or any member of the AGENCY staff that may have an impact on the outcome of the project. "Bidder" shall also list current clients who may have a financial interest in the outcome of the project.

SECTION 6: EVALUATION CRITERIA

6.0. EVALUATION CRITERIA

The evaluator will review the offers according to the following criteria based on **a total number of 100 points**.

The **References, Resumes/Company Profile and Experience, Ability to Meet Supply Specifications, Method of Providing Services, and Price Proposal** portions of the offer will be evaluated based on the following Scoring Guide.

6.1. SCORING GUIDE

In awarding points to the evaluation criteria, the evaluator/evaluation committee will consider the following guidelines:

6.1.1. (90-100%). SUPERIOR RESPONSE. A superior response is a highly comprehensive, excellent reply that meets all the requirements of the RFP. In addition, the response may cover areas not originally addressed within the RFP and/or include additional information and recommendations that would prove both valuable and beneficial to the AGENCY.

6.1.2. (75-89%). GOOD RESPONSE. A good response meets all the requirements of the RFP and demonstrates in a clear and concise manner a thorough knowledge and understanding of the project, with no deficiencies noted.

6.1.3. (60-74%). FAIR RESPONSE. A fair response minimally meets most requirements set forth in the RFP. The "Bidder" demonstrates some ability to comply with guidelines and requirements of the project, but knowledge of the subject matter is limited.

6.1.4. (59% or Less). FAILED RESPONSE A failed response does not meet the requirements set forth in the RFP. The "Bidder" has not demonstrated sufficient knowledge of the subject matter.

6.2. WEIGHT OF CRITERIA

	Category	Section of RFP	Point Value
References			**10 points possible**
A.	References Included with "Bidder's" Response	4.1.1.	10
Resumes/Company Profile, Experience & Method of Providing Services			**40 points possible**
A.	Years of Experience	4.1.2.	15
B.	Staff Qualifications	4.1.2.	15
C.	Electronic Submission & Maintenance of Claims	4.1.2.	10
Work Task- Ability to Meet Supply Specifications			**30 points possible**
A.	Understanding AGENCY Transit System	3.1. & 4.1.3.	30
Work Task- Price Proposal			**20 points possible**
A.	Price Proposal	5.0.	10
B.	Conflict of Interest	5.1.	10

SECTION 6: PUBLIC NOTICE

California Vanpool Authority
Request for Proposals (RFP)
Proposal Deadline: Friday, May 23, 2025, at 1:30 P.M.

Dear Vendor:
You are invited to submit a proposal on or before the proposal date above for the following:

Solicitation for Insurance Broker Services

The work is defined in the attached specifications.
Proposals acceptance will be closed at 1:31 P.M. on above date at the office of:

CALIFORNIA VANPOOL AUTHORITY
8444 W. DOE AVENUE
VISALIA, CA 93291

Proposals arriving later than 1:31 P.M. or at a different location will not be considered and they will be returned unopened to the sender.

Proposals shall be submitted in a sealed envelope, clearly marked

"Sealed Proposal – Insurance Broker Services"

Be sure to complete all documents attached.

During the proposal stage, all correspondence and verbal requests shall be directed to:

California Vanpool Authority
8444 W. DOE AVENUE
VISALIA, CA 93291

Georgina Landecho, Executive Director
Voice: (866) 655-5444 ext. 101
glandecho@calvans.gov

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