



**REQUEST FOR QUALIFICATIONS:
INSURANCE BROKER**

A. Introduction

The Port of Harlingen is growing into the economic hub of South Texas. Sitting on the southern tip of Texas on the Arroyo Colorado River, the port is a shallow draft, inland port for barge and multimodal transport. Located 25 miles inland of the Gulf Intracoastal Waterway on more than 2,000 acres of land, the Port of Harlingen offers a gateway for global commerce as part of Foreign Trade Zone #62 to one of the largest trade zones in Texas. The Port was organized as a navigation district under the Texas Constitution Water Code, Chapter 62, Section 59, in 1926.

B. Scope of Work

The Scope of Work, which may be further defined in the final executed contract between the selected service provider and POH, is described below.

POH is a landlord port with 7 total employees. The port has between 20 and 30 tenants, that handle approximately 2MM tons annually.

POH is seeking written proposals from a brokerage firm and representative broker(s) to provide insurance broker services that include but are not limited to:

- Insurance placement and servicing
- General insurance advisory services
- Claims assistance and advocacy

POH currently maintains various Property and Casualty policies with the TML Intergovernmental Risk Pool. The port anticipates leaving these policies with the TMLIRP for the long-term. The selected firm will only handle insurance coverage not available with TMLIRP. Currently that consists of a single policy:

1. Windstorm or Hail Policy

The selected firm and representative broker(s) will work directly with POH Chief Financial Officer on all insurance related matters to include but not limited to, insurance coverages, certificates of insurance for additional insured, renewals, and claims. Applicants should bring a strong network of connections and contacts in the insurance market, be extremely responsive, meticulous, personable, and transparent.



Required Services/ Specifications

The applicant should be able to provide a range of services including but not limited to the following:

1. Assist with the claim submission and handling process,
2. Serve as the intermediary between POH and the underwriter/provider when there is a reasonable coverage dispute,
3. Provide premium estimates at least one (1) month in advance of renewal deadlines each year,
4. Negotiate with underwriters on behalf of POH and obtain coverage that best meets POH needs at the best cost, while also advising on the carrier's services,
5. Bind insurance coverage on the exact dates needed by POH,
6. Verify that new policies, binders, certificates, endorsements, and other documents are accurate, issued in a timely manner, and reflect the terms and conditions agreed during negotiations,
7. Provide coverage summaries for all new coverages and updates on changes to existing coverages,
8. Respond to policy related questions and request for advice from the POH CFO in a timely manner,
9. Assist the POH to coordinate inspection, audit, or other carrier requests,

C. Submission Requirements

The bidder's proposal must provide a detailed response and supporting documentation, where requested, to each of the following areas:

1. Cover page

- a. Please include the name of your organization, address, and contact information.
- b. Please include the name, title, and contact information for an authorizing official.

2. General Qualifications

- a. Provide a narrative of your firm, company culture, capabilities of firm, risk management plan, and claims control experience.
- b. Where is your firm headquartered, and where is the primary physical location from which you will be providing your services? A strong preference will be given to firms who will be providing services from one of the following counties in Texas: Starr, Hildago, Willacy or Cameron.

3. Contact With Marketplace

Proposers may not contact the insurance marketplace nor discuss our account with underwriters until we have made a final broker selection.



4. Technical Qualifications & Experience

- a. Provide a brief description of key personal experience proposed to be assigned to PHO's account.
- b. How is our data managed and is it exportable?
- c. What is your approach to securing the best premium rates, and how will you ensure that rates are competitive in the future.
- d. Please provide a list of clients that are similar to POH with which you have an on-going relationship.

5. Services

- a. Are other services provided? Such as claims advocacy, etc. If so, please expand and advise regarding cost.
- b. Describe your risk management services.
- c. How is your customer service team structured? Include information on accessibility to clients, client response time, and service level ratings.
- d. What is your turnaround time for issuing COI's/endorsements/named endorsements?

6. Fees

- a. Describe your proposed form of compensation (i.e., commission, annual retainer, fee-for-service) and fee rate.

7. References

- a. Provide references with contact information from a minimum of two clients who currently use your services.
- b. Please list, by name, three largest local government entities; or list three largest accounts whose operations you believe are most similar in scope as POH.

D. Proposal Format

Proposals which fail to address each of the submission requirements above may be deemed non-responsive and will not be further considered. Note that responses to RFQ requirements must be specifically answered within the context of the submitted proposal. POH's evaluation team will not refer to a designated website, brochure, or other location for the requested information.



E. Submission of Proposals

Please submit proposals to: **Robert B. McDonald**
Chief Financial Officer
Email Robert@portofharlingen.com

Proposals due by: **March 14, 2025 4:00pm – Central Standard Time**

Proposals must be submitted via email by the date and time specified above. POH encourages inquiries concerning this RFQ. All questions pertaining to this RFQ must be made via email to Robert B. McDonald, CFO, Robert@portofharlingen.com. Questions are due by 4:00 PM CST, **Friday, March 7, 2025**

F. Proposal Timeline

POH intends to follow the timeline below for review and award of this solicitation:

Event	Date
RFQ issued	February 28, 2025
Questions Due	March 13, 2025, 4:00 PM (CST)
Deadline for Submittal	March 26, 2025, 4:00 PM (CST)
Review of Proposals	March 27 – April 2, 2025
Insurance Broker Selected	April 3, 2025

*Dates are subject to change at the discretion of POH

G. Proposal Evaluation

POH is committed to a transparent process of award and selection of an insurance broker with the intention to secure the best possible solution(s) for POH's ongoing needs while ensuring an optimal financial and operational outcome and the best value to our taxpayers and tenants.

An evaluation team will review, in detail, all proposals received to determine the best value, using the selection criteria described below. Responder(s) may be invited to participate in an



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oral interview and/or submission of any additional written information as requested by POH.

The following evaluation criteria will be utilized to evaluate the proposals by an internal evaluation team from PHI to determine the best value. A bidder can receive a maximum of 100p

- A) General Qualifications (10%)
- B) Technical Qualifications & Experience (40%)
- C) Services (25%)
- D) Physical location where primary services will be provided (20%)
- E) References (5%)

H. Solicitation Terms and Conditions

Discretion

POH may, at its sole discretion and after the evaluation process, choose not to issue any agreement as a result of this process.

Proposal Costs

There is no reimbursement for costs associated with preparing or submission of proposals in response to this RFP or costs associated with possible award negotiation.