

YWCA IS ON A MISSION

REQUEST FOR PROPOSALS

Licensed Public Adjuster – Insurance Claim Services

RFP # 20-0101

RELEASE DATE: JANUARY 28, 2020

SUBMISSION DEADLINE: FEBRUARY 7, 2020

CONTACT INFORMATION:

Rocio L. Castruita
r.castruita@ywcaelpaso.org
201 E. Main St., Suite 400
El Paso, Texas 79901-1383
www.ywcaelpaso.org

YWCA EL PASO DEL NORTE REGION
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services

Young Women’s Christian Association El Paso del Norte Region (referred to as YWCA) is soliciting proposals from qualified, licensed public insurance adjusters to provide property insurance claim services for YWCA facilities. The purpose of this RFP is to obtain information that will enable YWCA to select a licensed public adjuster that can assist YWCA with property damage claim(s) to recover insurance benefits in a timely manner. The public adjuster must be licensed by the State of Texas. This Request for Proposals (RFP) provides potential respondents with vital background information and describes the desired services, guidelines for submitting a response, and the selection process.

Background Information

YWCA is a 501(c)(3) not-for-profit organization formed as a women’s membership movement. YWCA is the largest in the nation, serving almost 40,000 households annually. The organization employs over 400 full-time and part-time employees. Revenues include fees for services, proceeds from special events, private foundation grants and approximately \$28 million from federal contracts. YWCA is a non-profit corporation and has been determined to be exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code. A Board of Directors composed of thirty-one (31) volunteers, the Chief Volunteer Officer being the President of the Board of Directors, governs the organization. The Board of Directors has hired a Chief Executive Officer (CEO) to serve as the person in charge of YWCA’s daily operations. The CEO is ultimately responsible for and oversees the operations of YWCA’s programs, the personnel, the procurement process utilized by YWCA to purchase goods and services, and all financial and compliance matters of the organization.

The work of the agency ties to its mission that states, “The YWCA El Paso del Norte Region is dedicated to eliminating racism, empowering women and promoting peace, justice, freedom and dignity for all.” A majority of YWCA’s services focus on the well-being of families, women and children, addressing areas of early childhood education, afterschool and teen programs, affordable housing for seniors and low-income households, health & wellness programs and workforce and leadership development. YWCA is the largest provider of transitional housing for homeless women & their children, and for survivors of sexual and family violence in the region. Far exceeding licensing standards, YWCA is the most-experienced and devoted child care provider in the region, servicing children of our El Paso community with the utmost care, quality and respect within our seven (7) early learning academies. YWCA is also the largest provider of licensed, high-quality afterschool programs in the region with over forty (40) locations. Through a contract with Workforce Solutions Borderplex (WSB), the Child Care Services (CCS) Division assists parents in meeting their childcare payments. YWCA also integrates social equality and empowerment activities throughout their existing programs. The organization also offers various community events designed to empower women and eliminate racism.

Administrative offices are located at 201 E. Main St., Suite 400, El Paso, TX 79901. Other facilities are located throughout the city of El Paso. Activities and locations are further detailed in our web site, www.ywcaelpaso.org and on Facebook, Twitter and Instagram.

YWCA EL PASO DEL NORTE REGION
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services

I. GENERAL INFORMATION

Procurement Standards

Procurement of goods and services shall be in compliance with the guidelines of 2CFR 200, OMB Circular A-122, A-110, or other applicable OMB Circulars, supplemented by the final rules promulgated by the Office of the Texas Governor under the Uniform Grants Management Standards, and the Texas Workforce Commission (TWC) Financial Manual for Grants & Contracts, Chapter 14, Procurement. These guidelines require that all procurement transactions be conducted in a manner to provide, to the maximum extent practical, open and free competition. Additionally, awards may only be made to organizations possessing the demonstrated ability to perform successfully under the terms and conditions of the contract agreement.

Eligibility To Respond

Organizations able to meet the technical specifications for quality and other terms of this RFP and not debarred and/or suspended from conducting business with federal and state funded agencies are invited to respond. A prospective proposer must affirmatively demonstrate responsibility. A prospective proposer, by submitting a RFP, represents to YWCA that it meets the following requirements:

- Possesses, or is able to obtain, adequate financial resources as required to perform under this RFP;
- Is able to comply with the required or proposed RFP;
- Has a satisfactory record of integrity and ethics;
- Be otherwise qualified and eligible to receive an award; and
- Be in good standing with the applicable national or state associations.

No contract(s) will be awarded to any respondent(s) that is/are on State or Federal sanctions, during the award phase of the procurement process.

Minority, disadvantaged, veteran-owned and women-owned businesses that are certified by the State as Historically Underutilized Businesses are encouraged to respond to this RFP.

For purposes of this RFP, interested contractors are referred to as Proposers, Respondents, Bidders, or Applicants.

Authorized Agency Contact

All communications regarding this Request for Proposals (RFP) must be addressed solely to Rocio Castruita, Contracts and Compliance Administrator, email at r.castruita@ywcaelpaso.org.

To ensure a fair and competitive bidding environment, communication is prohibited between YWCA officials, employees, or representatives and parties involved in the bidding process that could create an unfair advantage to any party with respect to the award of a YWCA contract. Communication is prohibited from the day that the Request for Proposals (RFP) is advertised until the day that a recommendation of a contract award is made. Any person, including but not limited to, bidders, lobbyists or consultants of bidders, service providers or potential vendors and any YWCA board member, YWCA staff, and associated parties are precluded from entertaining any questions outside the written question process described below. Potential applicants are asked to respect these conditions by

YWCA EL PASO DEL NORTE REGION
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services

not making personal requests for assistance. No unauthorized methods or sources of responses or clarification are considered valid. Any violation of this process may disqualify an applicant.

Changes, Amendments, Withdrawal, Re-Issuance

YWCA reserves the right to amend or withdraw this RFP at any time; reject any and all applications; re-issue this RFP and/or waive technicalities and to accept the proposal which in its judgment is in the best interested of the agency and its employees.

II. SCHEDULE OF ITEMS

RFP Packets

Request for Proposals (RFP) packets will be available beginning on and after 4:00 P.M. MST on Tuesday, January 28, 2020 at the address listed on the cover page. Packets may be picked up in person or may be requested in writing to the address listed in the contact section. The RFP will also be available on the YWCA website at www.ywcaelpaso.org.

Due Date and Delivery Method

The Contracts and Compliance Administrator or authorized YWCA staff must physically receive responses to this RFP. Sealed proposal packets must be received by:

4:00 P.M. MST on Friday, February 7, 2020

Responses submitted after this time will not be accepted under this RFP.

Any reasonable delivery method may be used, except facsimile and email. Use of a traceable delivery method such as certified mail-return receipt requested, guaranteed express service, or hand-delivery is recommended. Submissions post marked prior to the due date but received after the due date will not be considered. No email or facsimile will be accepted. YWCA will not be responsible for any lost or late deliveries.

RFP Schedule

The following schedule of events is subject to change at the discretion of YWCA. All requestors of this RFP will be notified of any and all changes. All times shown in the RFP are Mountain Standard Time Zone (MST).

Issuance of RFP	January 28, 2020 – 4:00 P.M. MST
Announcement Published in the El Paso Times	January 29, 2020 & January 30, 2020
Deadline to Submit Questions	January 31, 2020 – 2:00 P.M. MST
Questions and Answers Posted on Website	February 3, 2020 – 5:00 P.M. MST
DUE DATE for Request for Proposals (RFP)	February 7, 2020 – 4:00 P.M. MST
Evaluation of Proposals	February 10 - 11, 2020
Selection for Award	February 12 - 13, 2020
Contract Start Date	February 14, 2020

YWCA EL PASO DEL NORTE REGION
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services

Question & Answer Period

Prospective Bidder(s) may submit written questions no later than 2:00 P.M. on January 31, 2020. Submit questions via email to Rocio Castruita at r.castruita@ywcaelpaso.org. Answers to questions will be posted to YWCA’s website located at www.ywcaelpaso.org. All answers issued in response to Respondent questions become part of the RFP and the RFP process. Respondents are encouraged to view the website frequently to ensure they are fully aware of the most current information. Notifications of changes or addendums will be posted through YWCA’s website. Prospective Bidder(s) who notify YWCA (r.castruita@ywcaelpaso.org) that they may submit a sealed proposal will be notified of amendment(s) to the RFP packet and will be provided with answers to questions submitted or any other applicable clarification(s).

Submission of Proposals

Official receipt of proposals will be entered on a receipt form issued by YWCA staff. Bidder(s) who mail a proposal will be sent a copy of this receipt from upon request. Sealed proposals must be hand delivered or mailed to and labeled as follows:

YWCA El Paso del Norte Region
Contracts Department
RFP # 20-0101
201 E. Main St., Suite 400
El Paso, TX 79901

Timely delivery of proposals to the above address is the sole responsibility of the proposer. Proposals submitted via courier or overnight mail services will be considered hand-carried and must be received by the deadline.

All proposals will become the property of YWCA and will not be returned. No documents relating to this procurement will be presented or otherwise made available to any other person, agency or organization until after the funding award. Any proprietary information should be clearly marked “Proprietary”. All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the Proposer and will not be reimbursed by YWCA.

Contract Term Period

Any contract(s) awarded for the services delineated in the Scope of Services in this RFP will be effective upon determination of award and a fully executed agreement. The contract(s) resulting from this procurement will be for a 1-year term. YWCA reserves the right to negotiate up to four (4) one-year contract renewals or until project completion, when applicable, and is contingent upon satisfactory performance, need, and availability of funds. A contractor performance evaluation will be required at the end of each year.

YWCA EL PASO DEL NORTE REGION
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services

III. SPECIFICATIONS

Scope of Services

The purpose of this Request for Proposals (RFP) is to solicit and award a contract to one (1) qualified, licensed public insurance adjuster to provide property claim investigation, loss estimation, claim valuation and claim submission services to the YWCA El Paso del Norte Region (YWCA) for occurrences affecting YWCA facilities that may be insured under any one or more of the following lines of commercial insurance: commercial property, equipment breakdown, inland marine, or commercial crime, and/or warranty.

The primary service of the investigation for the purpose of obtaining information in the course of adjusting or otherwise participating in the completion of any assigned occurrence must be performed by employed staff of the service provider. However, sub-consultants may be utilized to provide auditors, accountants, appraisers, or other professionals that may be required to produce and certify particulars and/or details necessary to arrive at the value of the damage resulting from the occurrence.

The licensed public adjuster will provide the following services:

- i. Provide a dedicated (but not necessarily exclusive) project manager with extensive knowledge and experience in conducting and managing investigations of direct physical damage and destruction occurrences, determining the insurability of resulting damage and expense, preparing statements of loss and managing the submission to include the ultimate disposition of assigned claims through cooperative resolution with insurance companies and/or with other contractually responsible parties as needed.
- ii. Provide a minimum of one qualified, licensed property claims professional and any, if needed, associated subject-matter specialist(s) to be assigned to investigate, evaluate and conclude property damage and destruction occurrences pursuant to insurance policy and possibly other contractual terms and conditions.
- iii. Contract services directly related to this agreement must be provided from a local provider located in El Paso, Texas.
- iv. Upon receipt of a notice of an occurrence from YWCA and within 24 hours of such receipt, contact the person assigned by YWCA as its primary contact person to initiate the occurrence investigation and analysis process. Within 72 hours of the initial notice of occurrence conduct an on-site inspection of the property damage and provide a brief initial summary report to YWCA.
- v. Identify, analyze and document the cause and origin of the occurrence that may result in property loss or damage, and/or business interruption loss. Provide an analysis of whether, and to what extent, the property loss or damage, and/or business interruption loss resulting from an occurrence is covered by insurance or by other possible contractually responsible parties. Provide an analysis of any possible sources of recovery or subrogation, in addition to property insurance companies or another contractually responsible parties that may be responsible for the loss or damage.

YWCA EL PASO DEL NORTE REGION
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services

- vi. For each file, keep an activity log, maintain documentation of any investigation and all telephone conversations, discussions, or meetings that contributed to the evaluation of property and loss analysis along with documentation of the communications and progress with insurance companies related to each claim being handled. This information and documentation will be made available for review by YWCA at any reasonable time.
- vii. If appropriate, prepare an independent estimate of damages using Xactimate or similar industry-wide used software or with an independent construction estimating firm. Work with YWCA personnel to obtain an inventory of the damaged contents, such as furniture, fixtures, equipment and records if applicable.
- viii. Cordially work with any involved insurance company, or other entity’s claim adjusters and collaborate to establish necessary lost reports and establish appropriate loss reserves, if applicable.
- ix. Within thirty (30) calendar days of receipt of claim, provide to YWCA an initial full report containing cause or origin information, a detailed evaluation of the damages, a description of the nature and timing of any remaining work necessary to submit proof of loss to any insurance company and an initial estimate of the cost of direct damages, extra expense, business interruption, and any additional claim investigation and analysis provided by subject-matter specialist(s). Include a monthly loss summary report, in excel format, indicating all open and closed claims, the cause of each occurrence, the nature of the loss or damage, the estimated cost of the loss, the estimated final recovery from insurance or other source. Updates to the initial report are due every thirty (30) calendar days following the initial full captioned report until the file is closed.
- x. In cooperation with YWCA, prepare and submit claim with any required documentation to include proof of loss documentation to any involved insurance company responsible for restoration payments while maintaining consistent communication in every phase of the claim process with YWCA assigned-personnel for the purpose of resolving the loss claim. If requested, attend loss-related settlement and mediation conferences and hearings, and provide analysis and opinion to YWCA on the best approach to resolve issues with insurance companies and other entity’s claim and legal representatives.
- xi. Assist YWCA staff to develop, to distribute, to implement via staff training and to maintain current a property loss or damage investigation procedure, process and checklist for its use.

Minimum Qualifications, Experience and Methodology (Attachment B and Attachment C)

Proposals should identify high standards of skill, knowledge, ability and experience of staff assigned to support this contract; and clearly demonstrate proposer’s services are proactive and goal-oriented.

Proposer’s description and affirmation of each of the following minimum qualifications. Please include the following in Attachment B – Proposal Narrative and Organizational Capacity:

YWCA EL PASO DEL NORTE REGION
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services

- i. Licensed public adjuster has five (5) or more years of experience as a property claims service provider in the State of Texas specifically working in city of El Paso, Texas will similar agencies as YWCA.
- ii. Provider represents that it has the qualifications and skills necessary to perform the services under the contract in a competent and professional manner without the day-to-day direction of YWCA.
- iii. Services will be performed in accordance with the generally accepted principles and practices applicable to the industry/profession. Proposer warrants that the licensed public adjuster, provider employees and any sub-contractors are properly licensed, registered, and/or certified as may be required under any applicable federal, state and local laws, statutes, ordinances, rules and regulations relating to the proposer's performance of these services.

Proposer's applicable experience and ability to meet the RFP deliverable requirements both in terms of scope and scheduling. Please include the following responses for items i. and ii. under Attachment B – Proposal Narrative and Organizational Capacity and reference information for item iii. under Attachment C - References:

- i. An overview of the Proposer's business activities, including a description, and the duration and extent of the Proposer's experience in investigating and evaluating property damage occurrences and submitting claims to insurance companies or other responsible parties, and achieving appropriate resolutions. Particular emphasis should be placed on work completed for entities located in the city of El Paso, Texas.
- ii. For each key staff member who would work on this project, a resume describing the individual's background, training, and experience to include the individual's ability and experience in providing the proposed services. Please provide a copy of the State of Texas license for public adjusters.
- iii. Proposers shall submit the requested reference information for three (3) recently-served organizations with similar project/services that are located in the city of El Paso, Texas. Please refer to Attachment C - References.

Describe Proposer's means and methods to furnish the services/reports required herein. Please include the following in Attachment B – Proposal Narrative and Organizational Capacity:

- i. Description of how the proposed services will be provided including how the services will meet YWCA's scope of service requirements.
- ii. Description of how Proposer will provide prompt service response with particular emphasis should be placed on timeliness of Proposer's response and effective methods to successfully closed a claim.
- iii. Provide a sample of both the initial report and loss summary report mentioned above in Scope of Services section.

YWCA EL PASO DEL NORTE REGION
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services

General Requirements

Respondent is required to comply with all federal, state, and local laws, rules and regulations, YWCA policies and procedures, and the terms and conditions of this contract as follows:

- Provide General Liability Insurance as required by YWCA policies.
- Demonstrate the ability to provide the requested services.
- Comply with budget constraints and the appropriate billing procedures.

IV. SUBMISSION GUIDELINES

General Guidelines

To be considered for award, each respondent must submit an offer (proposal) and other supporting documentation in accordance with these instructions. When evaluating a proposal, YWCA will consider how well the respondent complied with these instructions. YWCA will consider any failure on the part of the respondent to comply with these instructions to be an indication of the type of conduct it can expect during contract performance. Therefore, YWCA encourages respondents to contact the Authorized Contact by email to request any additional clarification that may be needed to comply with these instructions.

Format

Each respondent is required to submit one (1) signed original, three (3) copies and one (1) reproducible master disk or flash drive prepared or converted to Microsoft Office Software (Word, Excel, etc.) or PDF of the complete proposal response. The original must clearly be marked "ORIGINAL" on the cover sheet and contain signatures, where applicable. Double-sided printing is allowed. All responses must be typed and will become the property of YWCA. All responses, forms and attachments must be submitted on standard 8.5 by 11-inch paper, and either stapled or bound together. Font size must be no smaller than 12 point, single space.

Each copy of a completed Request for Proposal must contain all of the following documents in the order indicated.

- a) **Attachment A:** Proposal Cover Sheet - Must be signed by the individual having contract signature authority.
- b) **Attachment B:** Proposal Narrative and Organizational Capacity - Completed and Signed Statement of Work: Include a brief summary of your company's background, capabilities, and qualifications for the staff. Describe your organization's capacity to manage and provide services proposed. Describe your organization's past experience and performance in operation and provision of a similar type and complexity as described within the RFQ.
- c) **Attachment C:** References – All firms shall submit the requested information for three (3) recently-served organizations with similar project/services.
- d) **Attachment D:** Proposed Cost
- e) **Attachment E:** Franchise Tax Account and Proof of General Liability Insurance

**YWCA EL PASO DEL NORTE REGION
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services**

- f) **Attachment F:** Assurances and Certifications – The individual having contract signature authority as indicated on the cover sheet at Attachment A must sign the Assurances and Certification Document. Do not re-type this document, use the copy provided with this RFP.
- g) **Attachment G:** Historically Underutilized Business (HUB) Certificate (if applicable) – If the Respondent’s organization is HUB certified, enter the certification on the cover sheet and attach a copy of the HUB Certificate.

Evaluation Criteria

YWCA will award the contract to the bidder(s) that submits a bid which represents the best value to the agency. The best value shall not be based solely upon price but the bid that receives the highest cumulative score for each of the evaluation factors delineated herein.

YWCA may request a meeting/presentation with some qualified Proposers prior to final selection.

Each response will be awarded a numerical rating based on the information provided by the respondent, up to the maximum number of points indicated for each area of consideration. There are 100 points available. The review and evaluation of proposals shall be based on the following criteria:

CRITERIA (applicable RFP Section)	MAXIMUM NUMBER OF POINTS
Proposer’s Qualifications and Resources (Attachment B)	30
Experience and Demonstrated Abilities (Attachment B and C)	20
Methodology to Meet Project Goals (Attachment B)	20
Cost Proposal (Attachment D)	30
Maximum Score	100

Historically Underutilized Businesses (HUB) (5 Points, Tie Breaker)

In the event that two (2) or more responsive proposals end-up with a tie score the following criteria will be used as a tie-breaker:

A respondent that is State HUB certified and has provided the organization’s State HUB Certification Number of the Cover Sheet (Attachment A) and attached a copy of the State HUB Certificate (Attachment H) will be awarded five (5) points.

The bonus points will not be added to the total score but only used to break the tie scores between bidders.

Governing Provisions

YWCA reserves the right to contact any individual, agencies, or employers listed in a response to the RFP, to contact others who have experience and/or knowledge of the Respondent’s relevant performance and/or qualifications and to request additional information from any and all respondents.

YWCA reserves the right to negotiate the terms of any and all agreements with Respondents selected and such agreements negotiated as a result of this RFP may be re-negotiated and/or amended in order to successfully meet the needs of the agency.

YWCA EL PASO DEL NORTE REGION
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services

The contents of a successful application may become a contractual obligation if selected for the award of a contract. Failure of a Respondent to accept this obligation may result in cancellation of this award.

V. ATTACHMENTS

The following attachments are to be submitted with the proposal in the order indicated in this RFP.

This space left intentionally blank

ATTACHMENT A: PROPOSAL COVER SHEET
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services

Legal Business Name: _____

Physical Address: _____

Mailing Address: _____

Contact Person & Title: _____

Telephone: _____

Fax: _____

Email: _____

Company Website: _____

Authorized Representative Signature: _____

Authorized Representative Printed Name and Title: _____

Tax/Legal Status:

_____ State Government Agency	_____ Local Government	_____ Union
_____ Community College	_____ Local School District	_____ Non-Profit
_____ Private For-Profit	_____ Other: _____	

Federal Employer Identification Number: _____

Texas State Comptroller ID Number: _____

Historically Underutilized Business (HUB) Certification Number: _____

ATTACHMENT B: PROPOSAL NARRATIVE AND ORGANIZATIONAL CAPACITY
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services

FIRM BACKGROUND AND STAFF INFORMATION

Year Present Firm Established: _____

Parent/Former Company Name(s) if any, and Year(s) Established: _____

Number of Licensed Public Adjuster(s) in Firm: _____

Total Employees in Firm (El Paso, TX Office Locations): _____

Proposals should identify high standards of skill, knowledge, ability and experience of staff assigned to support this contract; and clearly demonstrate proposer’s services are proactive and goal-oriented.

Proposer’s description and affirmation of each of the following minimum qualifications. Please include the following:

- i. Licensed public adjuster has five (5) or more years of experience as a property claims service provider in the State of Texas specifically working in city of El Paso, Texas will similar agencies as YWCA.
- ii. Provider represents that it has the qualifications and skills necessary to perform the services under the contract in a competent and professional manner without the day-to-day direction of YWCA.
- iii. Services will be performed in accordance with the generally accepted principles and practices applicable to the industry/profession. Proposer warrants that the licensed public adjuster, provider employees and any sub-contractors are properly licensed, registered, and/or certified as may be required under any applicable federal, state and local laws, statutes, ordinances, rules and regulations relating to the proposer’s performance of these services.

Proposer’s applicable experience and ability to meet the RFP deliverable requirements both in terms of scope and scheduling. Please include the following:

- i. An overview of the Proposer’s business activities, including a description, and the duration and extent of the Proposer’s experience in investigating and evaluating property damage occurrences and submitting claims to insurance companies or other responsible parties, and achieving appropriate resolutions. Particular emphasis should be placed on work completed for entities located in the city of El Paso, Texas.
- ii. For each key staff member who would work on this project, a resume describing the individual’s background, training, and experience to include the individual’s ability and experience in providing the proposed services. Please provide a copy of the State of Texas license for public adjusters.

Describe Proposer’s means and methods to furnish the services/reports required herein. Please include the following in Attachment B – Proposal Narrative and Organizational Capacity:

- i. Description of how the proposed services will be provided including how the services will meet YWCA’s scope of service requirements.
- ii. Description of how Proposer will provide prompt service response with particular emphasis should be placed on timeliness of Proposer’s response and effective methods to successfully closed a claim.
- iii. Provide a sample of both the initial report and loss summary report mentioned above in Scope of Services section.

ATTACHMENT C: REFERENCES
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services

REFERENCES Please list three (3) previous past projects that would be representative of your firm's work and services provided in the past 5 years.

1) Entity _____

Contact Person _____

Contact Information (Telephone & E-Mail) _____

Project Description (Include Project Cost and Project Size) _____

Services Provided & Date (Include Completion Timeline) _____

2) Entity _____

Contact Person _____

Contact Information (Telephone & E-Mail) _____

Project Description (Include Project Cost and Project Size) _____

Services Provided & Date (Include Completion Timeline) _____

3) Entity _____

Contact Person _____

Contact Information (Telephone & E-Mail) _____

Project Description (Include Project Cost and Project Size) _____

Services Provided & Date (Include Completion Timeline) _____

ATTACHMENT D: PROPOSED COST
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services

Proposed Cost

Please specify and explain your cost per claim as a percentage of commission of the total claim amount. The proposed fee shall be inclusive of the following items:

Specify cost as a percentage fee of the final settlement amount per claim. Indicate whether the per claim cost includes all the requested service deliverables for this RFP.

State your proposed method of compensation for representing YWCA in negotiations for property insurance claim services.

If a flat fee is submitted, please include the total number of claims included in the fee and the annual maximum cost. Other pricing methods will also be considered but for comparative purposes please provide proposed cost fee as a percentage of the final settlement claim amount.

This space left intentionally blank

**ATTACHMENT E: FRANCHISE TAX ACCOUNT AND PROOF OF GENERAL LIABILITY INSURANCE
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services**

Franchise Tax Account Status

All vendors must attach a copy of their current Franchise Tax Account Status from the Texas Comptroller of Public Accounts. Out of state respondents should submit Certificate of Good Standing from their state of operation. The Web Site address to obtain this certificate is: <http://www.window.state.tx.us/taxinfo/coasintr.html>. If the Franchise Tax Account Status is not applicable, the respondent must indicate as such and provide a reason for non-applicability i.e., non-profit organization, sole proprietorship, etc.

Proof of General Liability Insurance

YWCA will require the architect selected to maintain professional liability insurance with limits of not less than \$1,000,000. All vendors must provide proof of General Liability insurance in the form of a certificate of liability insurance. A certificate of insurance showing commercial general liability for the limit of \$1,000,000 each occurrence, issued by a company duly authorized to issue insurance in the State of Texas, and providing that such policy shall not be cancelled for any reason without thirty (30) days prior written notice by insurer to YWCA and naming the YWCA El Paso del Norte Region as additional insured.

This space left intentionally blank

ATTACHMENT F: ASSURANCES AND CERTIFICATIONS
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services

Assurances and Certifications

The authorized representative agrees to comply with all applicable State and Federal laws and regulations governing YWCA El Paso del Norte Region and any other applicable laws and regulations. The authorized representative certifies that the proposing organization possesses legal authority to offer the attached proposal.

The undersigned Respondent certifies that neither it nor its principals:

- (1) Are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal or state department or agency;
- (2) Have not within a three-year period preceding this application been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction, violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false statements, or receiving stolen property;
- (3) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity with commission of any of offenses enumerated in Paragraph (2) of this section; and
- (4) Have not within a three-year period preceding this application had one or more public transactions terminated for cause or default.

Conflict of Interest: The undersigned Respondent certifies that:

- (1) Their organization has not prepared this bid in collusion with any other vendor and that the contents of this bid have not been communicated by the organization or its agent(s) to any other person engaged in this type of business.
- (2) No manager, employee or paid consultant of the Bidder is a member or is married to a member of the YWCA Board, President, or an employee of YWCA El Paso del Norte Region;
- (3) No member of the YWCA Board of Directors, or an employee of YWCA owns or has any control in the Bidder's organization;
- (4) No member of the YWCA Board of Directors or employee of YWCA receives compensation from Bidder for lobbying activities;
- (5) Bidder has disclosed within the proposal response any interest, fact or circumstance that does or may present a potential conflict of interest.
- (6) Should Bidder fail to abide by the foregoing covenants and affirmations regarding conflict of interest, Bidder shall not be entitled to the recovery of any costs or expenses incurred in relations to any contract with YWCA and shall immediately refund the YWCA any fees or expenses that may have been paid under the contract and shall further be liable for any other costs incurred or damages sustained by YWCA relating to that contract.

Acknowledgement of Cooperation regarding Affirmative Action

YWCA El Paso Del Norte Region, as an equal opportunity employer, has developed an affirmative action plan and has an ongoing commitment to hire and develop the best people we can find, basing our judgment on their job-related qualifications. For this reason, we are asking your assistance and cooperation in actively recruiting and referring qualified applicants for all jobs without regard to race,

ATTACHMENT F: ASSURANCES AND CERTIFICATIONS
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services

gender, religion, national origin, ethnic background, age, disability, political beliefs or veteran status. Because of our commitment as an equal opportunity employer, we request your service to include active recruitment of qualified minority and female applicants for all positions when available.

The undersigned authorized representative affirms that she/he is duly authorized to sign proposals on behalf of the organization. The undersigned authorized representative of the respondent herein certifies that the statements above pertaining to Debarment, Suspension and Other Responsibility Matters; Conflict of Interest; and Nondiscrimination are true and correct as of the date of submission.

Respondent must notify YWCA El Paso del Norte Region in writing if the authorized signatory changes.

Certified by:

Signature of Authorized Representative

Printed Name of Authorized Representative

Title of Authorized Representative

Business Name

Date

**ATTACHMENT G: HISTORICALLY UNDERUTILIZED BUSINESS (HUB) CERTIFICATE
RFP #20-0101 Licensed Public Adjuster – Insurance Claim Services**

HUB Certificate

Respondents certified as a Historically Underutilized Business (HUB) in the state of Texas should submit a copy of the HUB certificate.

This space left intentionally blank