

December

2020



Request for Proposals

Insurance Brokerage Services

Submittal Deadline: January 29, 2021

Lake Charles Harbor & Terminal District
Lake Charles, Louisiana

1. Introduction

The Port of Lake Charles is soliciting proposals from interested firms to provide the Port with professional services in support of its insurance program.

The Port's goals and objectives in this RFP are guided by the need to:

- Obtain the services of an insurance broker licensed in the State of Louisiana to act as the Port's Broker of Record for a three year period beginning March 1, 2021, and assist the Port in all aspects of risk transfer.
- Obtain the best mix of insurance coverages, including but not limited to, general liability, property, business automobile, equipment breakdown, inland marine equipment floater, railroad, environmental legal, crime, terrorism, public officials, workers compensation, police and professional, marine terminal operators, and maritime employers at a reasonable cost.
- Provide consultation with Port personnel and Port legal counsel with respect to liability and indemnification provisions in leases, contracts, and other documents.

The Port will select a firm on the basis of best value to the Port, including various criteria such as experience, qualifications of staff, schedule, past performance and cost.

2. Overview

The Port is an independent political subdivision of the State of Louisiana created by action of the Louisiana Legislature in 1924 and authorized by Louisiana Revised Statutes 34:201 et seq. The Port operates a deep-water port on the Calcasieu Ship Channel and encompasses 203 square miles in Southwest Louisiana. Presently, the Port owns and manages five public marine terminal facilities commonly designated as the Port of Lake Charles.

The District provides the infrastructure for marine terminal facilities designed to accommodate a wide range of cargoes. Some of these facilities are owned and operated by the District; some are owned by the Port and leased to private terminal operators.

Cargoes shipped through Port facilities are classified into two primary categories, bulk cargoes and break-bulk cargoes. Bulk cargoes include primarily dry bulk commodities such as petroleum coke, barite, rutile and grains. These cargoes are loaded through one of the Port's bulk terminals, with the most active bulk terminal being Bulk Terminal No. 1. Break-bulk cargoes are unitized cargoes such as bagged flour, bagged rice, lumber, and linerboard. Break-bulk cargoes typically move through the transit sheds, berths and warehouses in the area of the Port calls City Docks.

The Port owns three dry bulk terminals specializing in commodities such as petroleum coke, barite, rutile, aggregate, grains, and caustic soda. These terminals are equipped with loading and unloading facilities that include ship loaders, ship unloaders, rail car rollover, truck and rail hoppers, pits and chutes, conveyor systems, scales, silos and open-air storage pads.



The City Docks area has 11 transit sheds, 15 back warehouses and two open berths and can accommodate 12 ships in port simultaneously. The City Docks have approximately 1.6 million sq. ft. of covered storage. City Docks is an intermodal facility accessible via road, rail, or water. However, many of these transit shed and warehouses were badly damaged by Hurricane Laura.

The Port owns approximately 5,400 acres in Southwest Louisiana. These properties include leased acreage to both traditional and non-traditional port related tenants, spoil disposal sites, and acreage available for future development. During 2019, lease revenues accounted for approximately \$17.6 million, or 44% of total Port operating revenues.

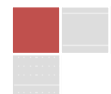
3. Scope of Services

The work under this RFP may entail, but is not necessarily limited to, the following list of services:

- A. Assist the Port in identifying and analyzing its loss exposures on an ongoing basis.
- B. Recommend types of insurance coverages, policy limits, policy terms, and program adjustments when appropriate.
- C. Assist the Port in completing and submitting insurer applications for all coverages.
- D. Develop an insurance marketing strategy and place all required coverages.
- E. Assure that insurance policies are placed with reputable and financially responsible insurers.
- F. Verify the accuracy of all rates and premium charges.
- G. Review insurance policies, binders, and endorsements to assure all wording is complete and accurate and promptly submit originals to the Port.
- H. Provide or obtain answers to insurance coverage questions.
- I. Prepare insurance certificates and endorsements as required. Monitor changes on an ongoing basis in the financial ratings/status of carriers used in the Port's program and advise the Port when changes occur that may negatively impact the program.
- J. Assist with risk management questions as they arise.
- K. Assist in the filing of claims with, and obtaining settlements from, insurers.
- L. Obtain and maintain updated loss information from current and prior insurers.
- M. Maintain accurate claims data and provide status reports as required by the Port.
- N. At least 60 days prior to the renewal date of Port policies, submit a written report discussing the anticipated issues concerning insurance terms and conditions, market conditions, trends and anticipated changes.
- O. At the request of the Port, meet with Port Staff to review the Port's insurance program and the Broker's contract performance.
- P. Provide other services customarily provided by insurance brokers.

4. Proposal Submission Information

All proposals are to be submitted no later than 3:00 pm on January 29, 2021 at the Port's Administration office located at 1611 West Sallier St., Lake Charles, LA 70601. Proposals may be submitted as a hard copy or electronic copy in accordance with all requirements set forth in this RFP. **Late Proposals will not be accepted.**



Request For Proposals

The Port will consider only responsive proposals from responsible firms for a contract award. A responsive proposal is a proposal that complies with requirements stated in this RFP. A responsible firm is one that demonstrably possesses the skill, ability, and integrity necessary to faithfully perform insurance brokerage services for the Port of Lake Charles.

The Port at its sole discretion will award the contract to the candidate submitting the most advantageous proposal, taking into consideration each proposal's relative merits. A contract will only result when a proposal has been approved by the Board of Commissioners of the Port.

All questions will be submitted to clandry@portlc.com with a deadline for questions of January 15, 2021.

Interested firms should prepare a written proposal for services based upon the scope of work noted in section 3 above. Proposals should clearly demonstrate an understanding of the scope of services and should reflect the proposer's ability to perform the work requested. Include the following sections:

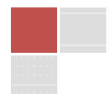
1. Introduction
 - a. Firm/Team along with relevant history and overall services
 - b. Qualifications/Experience
 - i. Specifically identify previous work in the maritime industry
2. Capabilities
 - a. Provide a description of the types of services
 - b. Describe capabilities of the firm to provide the services
3. Client Reference List
4. Strategic Approach
 - a. Identify the Firm's proposed approach to providing services
 - b. Identify how the Firm communicates and presents work to clients
5. Cost Proposal

The Port reserves the right to amend this RFP and to reject any or all of the proposals submitted.

5. Selection Criteria:

Selection will be based on overall value, which includes but is not limited to expertise, experience, references, responsiveness, demonstrated understanding of the project, ability to execute the work, as well as price. All submitted proposals are to be limited to a length, including resumes, not to exceed 15 pages.

Criteria	Points
Qualifications/Experience	50
Strategic Approach and Capabilities	25
Pricing for Services	25
Total Points Possible	100



Submission of the Proposal:

The proposal may be submitted via hard copy or email to clandry@portlc.com.

The proposal must be received by 3:00 PM CST January 29, 2021. Each Firm shall submit one (1) electronic copy or hard copy of their proposal for review. Each RFP will be evaluated. This is not a public call for bids; therefore, there shall be no public opening of RFPs. All materials provided to the Port shall become property of the Port and will not be returned to the firm.

Schedule: Dates are tentative and subject to change:

<u>Task</u>	<u>Target Date</u>
Request for Proposal	December 22, 2020
Proposals Due	January 29, 2021
Award Contract	February 22, 2021
Contract Execution	March 1, 2021

6. Terms and Conditions:**RFP Policies and Procedures:**

Anyone who intends to submit a proposal must contact the Port directly and specifically request a copy of this RFP by mail, phone or email. Contact Cameron Landry at the Port of Lake Charles:

Cameron Landry
1611 West Sallier Street
Lake Charles, LA 70601
337-493-3546

Liability for Errors and Omissions:

While the Port has employed considerable effort to ensure an accurate representation of information in this RFP, the information is not guaranteed or warranted to be accurate by the Port, nor is it necessarily comprehensive or exhaustive. Nothing in this RFP is intended to relieve firms from forming their own opinions and conclusions with respect to the matters addressed in this RFP.

7. Questions:

Questions pertaining to this request for RFP must be directed in electronic format via e-mail to clandry@portlc.com. All questions will be considered. Those that are considered to add clarity to the RFP will be addressed in writing with the question and answer provided to all firms.

