

Request For Proposals
Comprehensive
Insurance Broker Services

Tulsa International Airport
Tulsa Riverside Airport

Tulsa Airports
Improvement Trust

Issued By: Tulsa Airports Improvement Trust
7777 Airport Drive Suite A211
Tulsa Oklahoma, 74115

January 22, 2026

NOTICE TO BIDDERS
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TULSA AIRPORTS IMPROVEMENT TRUST
REQUEST FOR QUALIFICATIONS AND PROPOSALS
COMPREHENSIVE INSURANCE BROKER AND CONSULTING SERVICES (“Broker Services”)

Through a formal Request for Qualifications and Proposals (“RFP”) process, Tulsa Airports Improvement Trust invites the submittal of proposals from qualified, professional firms interested in performing Insurance Broker Services for the Tulsa Airports Improvement Trust.

The proposals will be reviewed and evaluated by Tulsa Airports Improvement Trust selection committee. At least one qualified firm for the services will be selected based on qualifications as defined by the criteria established in the RFP.

One (1) signed original (unbound) and one (1) copy, plus one (1) electronic (pdf format) copy of the RFP must be received no later than 5:00 p.m. on February 23, 2026, at the Airport Administration Office, Attention: Jeff Shaw, 7777 Airport Drive, Suite A-211 Tulsa, Oklahoma. 74115. All responses must be plainly marked "BROKER SERVICES RFP."

Copies of the RFP are available at the Airport Administration Office, 7777 Airport Drive, Suite A-211, Tulsa, Oklahoma. 74115, by request. The RFP packet will also be available on the Tulsa Airports website at [Business Opportunities - Fly Tulsa](#).

There will be no Pre-Proposal Meeting for this RFP.

Bids will be publicly opened and read as specified in the Request for Proposals, with all interested persons invited to attend via a pre-arranged Zoom call. Any bid received after the scheduled time for receipt of such bids will be returned to the Proposer unopened.

Tulsa Airports Improvement Trust reserves the right to cancel this RFP or waive any minor irregularities in bidding or reject any and all proposals on any basis and without disclosure of the reason.

Title VI Solicitation Notice:

As a condition of a grant award, the Sponsor shall demonstrate that it complies with the provisions of Title VI of the Civil Rights Act of 1964 (42 U.S.C. §§ 2000d et seq) and implementing regulations (49 CFR part 21) including amendments thereto, the Airport and Airway Improvement Act of 1982 (49 U.S.C. § 47123), the Age Discrimination Act of 1975 (42 U.S.C. 6101 et seq.), Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. § 794 et seq.), the Americans with Disabilities Act of 1990 (42 U.S.C. § 12101, et seq.), U.S. Department of Transportation and Federal Aviation Administration (FAA) Assurances, and other relevant civil rights statutes, regulations, or authorities, including any amendments or updates thereto. This may include, as applicable, providing a current Title VI Program Plan to the FAA for approval, in the format and according to the timeline required by the FAA, and other information about the communities that will be benefited and impacted by the project. A completed FAA Title VI Pre-Grant Award Checklist is required for every grant application, unless excused by the FAA. The Sponsor shall affirmatively ensure that when carrying out any project supported by this grant that it complies with all federal nondiscrimination and civil rights laws based on race, color, national origin, sex, creed, age, disability, genetic information, in consideration for federal financial assistance. The Department’s and FAA’s Office of Civil Rights may provide resources and technical assistance to recipients to ensure full and sustainable compliance with Federal civil rights requirements. Failure to comply with civil rights

requirements will be considered a violation of the agreement or contract and be subject to any enforcement action as authorized by law.

Jeff Shaw, C.M, ACP
Director, Risk and Legal Services
Secretary, Tulsa Airports Improvement Trust
jeffshaw@flytulsa.com

**Request for Proposals for
Insurance Broker Services
Tulsa International Airport
Tulsa Riverside Airport**

The Tulsa Airports Improvement Trust (“TAIT”) is seeking written qualifications and proposals from experienced and qualified insurance brokers/consultants desiring to provide a broad range of insurance related products and services to the Tulsa International Airport that include, but are not limited to, insurance placement and servicing, risk exposure analysis, claims servicing, and other general risk management services. The selected Health & Wellness Benefits Programs Broker will work closely with TAIT Human Resources in all aspects of employee benefits and associated risk management.

Tulsa International Airport, and Tulsa Riverside Airport (hereinafter collectively referred to as Tulsa Airports) are owned by the City of Tulsa and are operated by the Tulsa Airports Improvement Trust (“Board”) pursuant to an Amended and Restated Lease Agreement between City of Tulsa, Oklahoma and TAIT, effective as of January 1, 2014 as amended. The Trust Indenture for the Tulsa Airports Improvement Trust, Article IV, §4.2 states the TAIT Trustees shall have and exercise exclusive management and control of the Trust properties for the use and benefit of the Beneficiary. The Airports are financially independent and self-sufficient with revenues generated from, among other things, leases, administrative and fuel fees, concession agreements and parking revenues. While the Tulsa Airports may receive state and local grant monies, The airports receive no state or local taxes to operate the Airport.

This document outlines the prerequisites, selection process and documentation necessary to submit a proposal for the requested services. Omissions or failure to follow instructions on the part of the Proposer in preparing any portion of the proposal confers no right to withdraw or make changes, additions, or deletions to the proposal after the proposal submission deadline.

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1. General Requirements.

A. Sealed Proposals

Proposers are required to email jeffshaw@flytulsa.com of its intent to bid on or before January 26, 2026.

Please submit One (1) signed original (unbound) and one (1) copy, plus one (1) electronic (pdf format) no later than 5:00 p.m. on February 23, 2026 to be delivered to:

Tulsa International Airport
“Request for Proposals – Insurance Broker Services”
7777 Airport Drive, Suite A211
Tulsa, Oklahoma, 74115

Any proposal received after close of business February 23, 2026, will be deemed late and non-responsive and will be returned unopened to the Proposer.

All proposals will be date and time stamped upon receipt and shall be opened in public. All documents and information listed on Exhibit C – Proposal Checklist must be submitted in a sealed envelope that is clearly marked.

It is the sole responsibility of Proposers to ensure proposals are delivered to Tulsa International Airport by the appointed date and time.

THE AIRPORT WILL NOT BE LIABLE FOR DELAYS IN DELIVERY OF PROPOSALS DUE TO HANDLING BY THE U.S. POSTAL SERVICE, COURIER SERVICES, OVERNIGHT CARRIERS, OR ANY OTHER TYPE OF DELIVERY SERVICE, EVEN IF AN ATTEMPTED DELIVERY WAS MADE BEFORE OR AFTER BUSINESS HOURS AND DELIVERY WAS UNSUCCESSFUL. LATE PROPOSALS WILL BE RETURNED TO THE PROPOSER UNOPENED. ALL RESPONSIVE PROPOSALS BECOME THE PROPERTY OF THE AIRPORT AND MUST BE PROVIDED WITHOUT COST TO THE AIRPORT.

Further, each Proposer agrees that all information, data, documentation and material submitted or provided by the Proposer shall become the property of the Airport and it shall not be returned to the Proposer. All information, data, documentation and material submitted shall be considered public records and will be made available for inspection in accordance with the Oklahoma Open Records Act, 51 O.S. §24A.1. Any proprietary information, data, documentation and material that the Proposer wishes to remain confidential (to the extent allowed under the laws of the State of Oklahoma) should be clearly identified “confidential” on each such page of such designation in the proposal and the Proposer must provide justification for such a request.

The Airport reserves the right to reject any and all proposals, to waive minor informalities and irregularities in the proposal submission process, to request additional information and data from any or all proposers, to supplement, amend, or otherwise modify the RFP prior to the closing date and time, to cancel this request with or without the substitution of another RFP, to reissue the RFP, or to accept a proposal which is considered to be in the best interest of the

Airport.

Upon selection of a successful Proposer (hereafter referred to as “Broker”), the Agreement to be executed shall be in the form of the attached Sample Insurance Broker Services Agreement (Exhibit B) and shall be in accordance with Section 10.0 – Scope of Services. This RFP, any addenda thereto and the successful Proposer’s proposal shall be incorporated in and become a part of the final Insurance Broker Services Agreement.

By submittal of a proposal pursuant to this RFP, the Proposer certifies that no fee or commission, or any other thing of value, has been paid or agreed to be paid to any employee, agent, representative or official of TAIT or the City of Tulsa in order to procure the Agreement described in this RFP.

Proposals must conform to the requirements stipulated in this RFP. By submitting a proposal, each Proposer agrees that the proposal represents a firm offer to the Airport and that such offer shall remain open for acceptance until an Insurance Broker Services Agreement is executed by the Airport or for a period of no less than sixty (60) days from the date submitted, whichever occurs first.

Written proposals must include sufficient information to evaluate the following criteria:

- Proposer’s previous and current insurance broker services;
- Qualifications of Personnel;
- Ability to satisfactorily perform the minimum service and operational requirements;
- Evidence of financial stability;
- Proposed fee(s) as provided by Proposer; and,
- Ability of Proposer to meet Airport’s minimum insurance requirements.

All Proposers must have experience in providing insurance broker services and must agree to the terms and conditions in the Agreement provided by TAIT.

Bids will be publicly opened and read as specified in the Request for Proposal, with all interested persons invited to attend. Any bid received after the scheduled time for receipt of such bids will be returned to the Proposer unopened.

B. Withdrawal of Proposal.

No proposal may be withdrawn after it has been submitted to the Airport unless the Proposer makes a request for withdrawal in writing and the request is received by the Airport prior to the proposal submission deadline. No proposal may be withdrawn after the proposal submission deadline for a period of sixty (60) days.

C. Required Federal Provisions. See Exhibit I, which is attached hereto and made a part of this solicitation.

D. Solicitation Schedule

The following schedule has been established for this selection process:

Schedule	Scheduled Date	Days	
RFP Posted on flytulsa.com:	January 22, 2026		Days to Bid
Questions, clarifications Deadline:	February 9, 2026	20	32
Final Addenda (if any) posted on flytulsa.com:	February 13, 2026	24	
Proposal deadline/bid opening:	February 23, 2026	34	Days to Evaluate
Award:	March 6, 2026	51	17

All dates are tentative and subject to change.

Proposers are required to email jeffshaw@flytulsa.com of its intent to bid on or before January 26, 2026.

E. Questions, Inquiries and Airport Contact

The Airport is committed to providing all interested parties with accurate and consistent information in order to ensure that no Proposer obtains an undue competitive advantage. To this end, from the date of this RFP through award of the Agreement, the Airport contact is:

<p>Property, Risk, Etc. Broker Services Jeff Shaw, CM, ACP Director of Risk and Legal Services 7777 Airport Drive, Suite A211 Tulsa, Oklahoma, 74115 918-838-5056 jeffshaw@flytulsa.com</p>	<p>Health & Wellness Benefits Programs Broker Services Amanda Bryson, PHR, SHRM-SCP Director, Human Resources 7777 Airport Drive, Suite A211 Tulsa, Oklahoma, 74115 918-838-5019 AmandaBryson@flytulsa.com</p>
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All questions from Proposers must be submitted in writing, electronically, to jeffshaw@flytulsa.com no later than 12:00 p.m. February 9, 2026 (question/clarification deadline). It will be the sole responsibility of Proposers to ensure questions are submitted in a timely manner. Addendums to this RFP (if any), to provide clarification of written questions submitted by Proposers, will be posted on the Airport’s website no later than 12:00 pm February 13, 2026. Receipt of addenda (if any) must be acknowledged on the Proposal Form that must be submitted with the proposal.

Verbal communications and emails from TAIT, its staff, agents, employees or outside advisor, or any other person associated with this RFP will not be binding on TAIT and shall in no way modify any provision of the RFP. Only formally issued addenda modify the terms of this RFP. Any

addenda issued for this RFP will be published at the following website address: [Business Opportunities - Fly Tulsa](#). Proposers are responsible for checking the website prior to submission of proposals for any addenda. If you are unable to download the addenda, you may contact the Airport Contact noted in this Section.

2. Background Information

A. Tulsa International Airport (TUL)

Tulsa International Airport, which began operations in 1928, is located within the limits of the City of Tulsa, is approximately seven miles northeast from the central business district. TUL encompasses approximately 4,926 acres, the majority of which are used for TUL operations or reserved for future TUL growth. The remainder of the acreage is used for an Air National Guard facility, facilities for Spirit Aerosystems, Inc. (“Spirit”), and the American Airlines Maintenance and Engineering Center.

The FAA classifies TUL as a small hub. A small hub is defined as a community enplaning less than 0.25% of the total passengers enplaned on certificated route air carriers scheduled service in the United States.

TAIT currently employs approximately 150 full-time and part-time employees, supporting building maintenance, airport operations, police, and administrative functions of the airport, and all residing in the Tulsa, OK, larger regional area. TAIT outsources janitorial, landscaping, parking operations.

As a defined contribution, fully insured employer, TAIT pays 100% of premiums for the base medical/Rx, dental, and vision plans at the family coverage level regardless of the employee’s family make-up. Employees receive a monthly allowance to offset elected premium costs, and any remaining balance is paid through payroll deductions. We offer “buy-up” plans for those three benefits. In addition, TAIT currently provides \$50,000 in employer-paid life insurance with options to purchase supplemental & spouse. TAIT matches 50% of dependent care FSA contributions, up to \$2,500, offers paid paternal leave,

Currently, employees are eligible for Medical, Rx, Dental, Vision, Supplemental Life and AD&D, FSA, HSA, Disability, Accident, Critical Illness & Hospital Indemnity. Spouses are eligible for Medical/Rx, Dental, Vision, Supplemental Life & AD&D, Accident, Critical Illness, and Hospital Indemnity when the employee signs up for coverage. Child(ren) are eligible for Medical/Rx, Dental, Vision and Supplemental Life & AD&D, Accident, Critical Illness, and Hospital Indemnity when the employee signs up for coverage.

In 2024, TUL reached a new record high for passenger traffic since the mid 2000’s with over 3.2 million passengers. Travelers had access to nonstop flights to 23 different airports, on one of six airlines operating from Tulsa International Airport.

Runway Complex. TUL’s runway pattern consists of two parallel North/South runways and an East/West runway, which are designed to accommodate 90 peak hour aircraft flight operations under visual flight conditions and a maximum of 50 peak hour operations under

instrument flight conditions. The primary North/South (18L/36R) runway is a concrete grooved runway, separated by 5,000 feet from the secondary runway, is 9,999 feet long and 150 feet wide, with high intensity edge lights, and precision approach path indicators. This runway was entirely reconstructed, with reconstruction completed in July of 2014, and has Category II instrument landing approach system for runway 36R and a Category I instrument landing approach system for runway 18L. The lighting system and all other field lighting at TUL are supported by two alternate sources of commercial power, with an electric power generator as a third source.

The secondary North/South (18R/36L) runway is constructed of grooved asphalt and is used predominantly by general aviation traffic. This runway has High Intensity Edge Lights with Runway End Identification Lights and Precision Approach Path Indicators. It is currently 6,101 feet long and 150 feet wide. This runway was extended 600 feet to its present length in 1985. This runway has a Category I instrument landing system for approaches from the north. All approaches are equipped with RNAV (GPS).

The East/West (08/26) runway is a concrete grooved runway which is 7,376 feet long and 150 feet wide. This runway has High Intensity Edge Lights, Runway End Identification Lights, Precision Approach Path Indicators, and RNAV (GPS) and VOR/DME instrument approach procedures to both ends of the runway.

The primary North/South (18L/36R) runway and the East/West (08/26) runway are designed to accommodate the heaviest commercial or military aircraft that are currently in service. The approaches and departures on all three runways are supported by the latest ASR 9 Radar system which is incorporated in the facilities of the Tulsa Air Traffic Control Tower.

Terminal Area. The air-line passenger terminal, which has approximately 568,151 square feet of usable space and 22 gates, is located on the south edge of TUL between the two parallel North/South runways. Access to the terminal is provided by expressways on the North, East and South sides of TUL and is supplemented by a major arterial street system around the perimeter of TUL. In addition, rail service is available on the North and South perimeters and an inland water port is located within five miles of the terminal building. The terminal uses a two-finger, two-level, concourse configuration with upper level gate lobbies. The central portion of the terminal, located between the concourses, houses passenger ticketing and commercial ground transportation. Each concourse has its own baggage claim area on the upper level located directly across from the public parking lot and is connected by a walkway to commercial ground transportation in the center terminal. Waiting areas, shops, offices and dining facilities are also located on the upper level.

TUL currently has over 70 tenants with over 200 local firms supporting aviation in the region. Tulsa International Airport is home to the largest commercial maintenance base in the world operated by American Airlines employing over 5,000 people with plans to continue to invest over \$200 million in their Tulsa facility despite the economic challenges faced as a result of COVID-19. The American Airlines Facility is not part of TUL's Leased Premises, and is not part of the Airport's insurable interest.

TAIT completed a \$17 million renovation project in 2020, which modernized Schwab Hall, the gateway to our security checkpoint, the rental car counters, and our central entrance from the

arrivals roadway. The project includes updated restrooms near the security checkpoint, installing a clear story that is similar to the Concourses, roof replacement on Schwab Hall and the baggage claim areas, HVAC improvements, and ceiling improvements. Since 2012, the airport has invested over \$200 million in renovations over the past 10 years to offer a modern and easy-to-navigate terminal for travelers.

In addition to the previous renovations, TAIT is investing in many capital assets to open opportunities for the airport. In August 2024, the airport broke ground on the largest investment of the airport's history – a \$110 million Air Traffic Control Tower and TARCON facility. Construction is ongoing, the construction is expected to be completed by fall 2026 with FAA installation and commissioning of their systems taking place thereafter.

The need of a new Federal Inspection Services (FIS) facility was identified in the 2010's – TAIT broke ground on a brand-new Federal Inspection Services (FIS) facility in January 2024. The facility will be an extension of the main terminal building and add the capabilities of commercial international flights in addition to general aviation international flights. The facility's expected completion is early 2026 with operations starting thereafter. This facility will add approximately 42,000 square feet to the Terminal Building complex in 2026.

Parking Garage. In 2018, TUL completed a project to reconstruct and expand the existing parking garage. The expansion included a covered third level that provides additional public covered parking and which allowed the airport to reclaim covered parking on the facility's lower level by moving rental car operations to the covered second level.

Planned CONRAC Facility - 2028. More than 220,000 passengers rent a car at TUL each year. With passenger parking demand growing, more parking spaces are needed. The 2nd level of the parking garage is where the current rental car operation is located. To meet this growing parking demand, a new Consolidated Rent A Car ("CONRAC") facility for rental car companies is currently in the planning stages as an extension to the existing parking garage. The current planned facility feature 493 ready stalls, 323 return stalls, and 623 storage stalls. The total projects costs are anticipated to be \$71M. All numbers are subject to change. This facility will satisfy the long-term needs of both the airport's parking demand and rental car companies' business.

General Aviation Facilities. Thirty major hangars have been constructed for general aviation activities at TUL. The principal suppliers of service to general aviation traffic are six fixed base operators, which provide fueling and other aviation services. There are approximately 174 general aviation aircraft based at TUL.

Aircraft Rescue and Fire Fighting ("ARFF")

Pro-Tec Fire Services of Green Bay Wisconsin Serves the Airport with comprehensive ARFF Services. The Tulsa Fire Department continues to service the Airport Premises for all fire emergencies not considered ARFF Services.

Other Facilities The following facilities described below are for informational purposes and not part of the Airport's insurable interests.

The Oklahoma Air National Guard, 138th Fighter Wing, is located in the extreme northeast section of TUL air operations area. This facility is located on 100.44 acres of land and employs approximately 1,000 civilians and military personnel. The Guard currently maintains General Dynamics F-16 aircraft.

The Army Aviation Support Facility, 1st Battalion 245th Aviation, located east of TUL employs 90 military and civilian personnel. They currently maintain 15 UH-60 military helicopter aircraft. The Army National Guard and Air National Guard have agreed to supplement emergency rescue services at TUL should a major disaster occur.

American Airlines (“American”) Maintenance, Repair and Overhaul Center (“MROC”), located on 244 acres along the central eastern edge of TUL, is American’s worldwide headquarters for maintenance and engineering. This facility is not on TAIT Premises and is only included as a description of entire airport complex.

B. Tulsa Riverside Airport

Tulsa Riverside Airport (“RVS”), which began operations in 1958, is located in the southwestern quadrant of the City of Tulsa, adjacent to the City of Jenks. Currently, RVS encompasses approximately 752 acres and is bounded on the south by 91st Street South, on the north by 81st Street South, on the east by the Midland Valley Railroad tracks, and on the west by Elwood Avenue.

Runway Complex. The RVS runway pattern consists of two parallel North/South runways and an East/West runway. All three runways are constructed of asphalt. The East/West (13/31) runway and the North/South (19L/01R) runway have a single-wheel gross weight bearing capacity of 70,000 pounds, and are equipped with Medium Intensity Runway Lights and Visual Approach Slope Indicators. The primary North/South (19R/01L) runway has a single-wheel gross weight bearing capacity of 60,000 pounds.

The primary North/South (19R/1L) runway is 5,102 feet long and 100 feet wide, with High Intensity Edge Lights, Precision Approach Path Indicators. Runway 01L has a Category I Instrument Landing System. The secondary North/South (19L/1R) runway is 4,208 feet long and 100 feet wide. The East/West (13/31) runway is 2,641 feet long and 50 feet wide. The latter two runways have Medium Intensity Edge Lights and Visual Approach Slope Indicators.

Runway 19R/1L is served by a parallel taxiway system which connects the runway with the apron and hangar areas located on the western portion of airport property. Runway 19L/1R is served by a parallel taxiway system located to the east of the runway. Both ends of Runway 13/31 are served by short parallel taxiways which connect the runway ends with the parallel taxiway systems serving the main runways. In addition, several stub taxiways connect the aircraft parking apron areas and hangar areas with the major taxiways serving the runways.

The taxiways are surfaced with asphalt and are 30 to 40 feet in width.

Other Facilities. RVS is served by an FAA Air Traffic Control Tower. The tower is equipped with a repeater radar unit (STARS) which receives a radar signal generated from the radar antenna located at TIA. RVS is serviced by miscellaneous aircraft repair, maintenance and dealer hangars. There are two active licensed full service fixed base operators at RVS providing full service through fuel sales, flight instruction, aircraft rental and maintenance. Flight instruction is principally provided by six service providers (Spartan School of Aeronautics, Riverside Flight Center, Tulsa Community College, Christiansen Aviation, Destinations EFC and Riverside Jet Center).

In addition, RVS is served by many hangar structures of various types including large fixed base operators, industry, flight schools, and maintenance hangars, small commercial aviation, undivided T-hangars, T-hangars, and executive and condominium hangars. There are approximately 500 aircraft based at RVS.

TAIT is currently making several capital investments into RVS including a new equipment shop building, new security fencing, rehabilitation of RWY 13-31, and new taxiway connectors. The airport featured over 260,000 operations in 2024, the highest in Oklahoma.

C. Current Coverages Information Summary

All terms on policies of insurance at the Airports, *excluding health & wellness benefits programs*, are on a fiscal year basis, beginning July 1 and ending June 30 of each year.

All terms on policies of *health & wellness benefits programs* at the Airports are on a calendar year basis, beginning January 1 and ending December 31 of each year.

Employee Benefits Programs

TAIT requires the use of an online benefits administration platform for all new hire, qualifying events, and open enrollment elections. It is the expectation that the selected broker provide access to and/or coordinate the access, set-up, and use of an identified administration platform and should be described in the proposal.

2026 Health & Wellness Benefits Providers (Policy Expirations: 12/31/2026)

Carrier	Policies
Blue Cross Blue Shield of Oklahoma	Medical/Rx
BlueCross BlueShield of Oklahoma	Dental
Mutual of Omaha EyeMed	Vision
Mutual of Omaha	Basic Life, STD, LTD, Voluntary Supplemental Life
Mutual of Omaha	Accident, Critical Illness, Hospital Indemnities
WEX Health	FSA, HSA, Dependent Care FSA, Limited FSA, COBRA Notification Letters
CommunityCare	Employee Assistance Plan (EAP)
MetLife	Personal Legal Plans
Idwatchdog from Equifax (EE only)	Identity Theft Monitoring
Nationwide	457(b) Retirement

Healthee	Virtual Healthcare Assistant & Benefit Navigator
ConnectSource (via current Broker)	PlanSource Benefits Admin. Platform

General Liability

Chubb (ACE Property and Casualty Insurance Company).

Limits

Product-Completed Operations Aggregate Limit	\$100,000,000
Personal Injury and Advertising Injury Aggregate Limit	\$50,000,000
Malpractice Aggregate Limit.....	\$50,000,000
Each Occurrence Limit.....	\$100,000,000
Fire Damage Limit any one fire	\$1,000,000
Medical Expense Limit Any One Person	Not insured.
Hangarkeepers Limit Any One Occurrence.....	\$100,000,000
Hangarkeepers Limit Any One Aircraft	\$100,000,000
Non-Owned Aircraft Liability Limit Any One Occurrence	\$100,000,000

Note: The General Liability Policies must have an Endorsement Related to the Oklahoma Governmental Tort Claims Act, Okla. Stat. tit. 51 §154, et seq., related to maximum claims based upon the statutory limits.

Property

AIG Specialty Insurance Company

Total Insurable Value: \$430,000,00.00

Public Officials and Employment Practices Liability

Navigators Insurance Company

Public Officials Liability	\$2,000,000
Employment Practices Liability	\$3,000,000

Airport Owners and Operators Liability*

Chubb (ACE Property and Casualty Insurance Company)

Named: RVS Private Hangar Tenants Insurance Group

Insured: Hangar Group Enrollees; Tulsa Airports Improvement Trust, TAA

Limits

BI, Personal and Advertising Injury and PD combined, subject to limits:	\$1,000,000
Product-Completed Operations Aggregate Limit	\$1,000,000
Personal Injury and Advertising Injury Aggregate Limit	\$1,000,000
Malpractice Aggregate Limit.....	NA
Fire Damage Limit any one fire	\$1,000,000
Hangarkeepers NOT in flight Limit One Occurrence	NA
Hangarkeepers NOT in flight Limit One Aircraft.....	NA
Non-Owned Aircraft Liability	\$1,000,000

*Explanation of Airport Owners and Operators Liability Coverages:

Tenants currently have an option to purchase their own insurance or join the RVS Private Hangar Tenants Insurance Group. TAIT pays the premiums, and maintains the list of tenants, and the tenants reimburse TAIT individually based on the total premium divided by the number of tenants joining the group, plus a small administrative fee retained by TAIT.

**Employers’ Liability (Workers’ Compensation)
Milford Casualty Insurance Company**

Limits

Bodily injury by accident, per employee	\$1,000,000
Bodily injury by disease, per employee	\$1,000,000
Bodily injury by disease, policy limit.....	\$1,000,000
Experience Modification	0.85

**Commercial Auto
Granite State Insurance Company**

Liability, Each Accident	\$1,000,000
Auto Med Payments	\$5,000

3. Intent of Project

It is TAIT's intent to contract for services with one (1) Insurance Broker (“Broker”) to assist TAIT in maintaining and developing its comprehensive insurance and health & wellness benefits programs and risk management programs for a period of three (3) years with two (2) one-year options to extend the agreement.

The selected Broker(s) will be expected to provide a full range of services, including but not limited to, placing TAIT’s insurance coverages, assisting Airport Leadership with insurance related issues and providing detailed, written insurance coverage recommendations, to be approved by the Airport Trustees of TAIT.

The selected Broker(s) will be expected to maintain adequate staff and facilities, maintain and retain records, maintain all required licenses, keep current on the changes in insurance law, meet with the Airport Leadership, and officers of TAIT and the Trustees, and be fully prepared to address TAIT's interests and needs in terms of products and services.

Additional provisions are included in the Insurance Broker Services Agreement (“Agreement”) which is attached hereto and made a part this RFP. The Agreement will incorporate the selected Broker's proposal, the Request for Proposals and other pertinent requirements and details.

No Broker(s) may contact insurance markets on behalf of TAIT prior to the selection of the Broker(s) by TAIT. Brokers who contact insurance markets prior to selection will be immediately disqualified from consideration.

4. Minimum Qualifications

A. Minimum Experience, Service and Operational Requirements of the Broker

The following minimum requirements have been established as a basis for determining the eligibility of the Broker and any assigned Account Executive. A proposal will be considered non-responsive if sufficient documentation is not provided to determine whether the Broker and the Account Executive meet the following minimum requirements:

Broker:

- TAIT requires an Oklahoma-licensed Broker that is independent and is not affiliated with any insurance company, third party administrative agency or provider network.
- The brokerage firm must have at least 10 years of experience in insuring and providing brokerage services to Airports or similar industry experience, which similar experience must be explained in the Proposal.
- Designate an Account Executive.
- Designate Practice Leaders in each of the lines of insurance required to be placed by TAIT.

B. Oklahoma Governmental Tort Claims Act

The Brokerage must have an understanding of the Oklahoma Governmental Tort Claims Act, and its implications related to limits of liability, if any, on all insurance products.

5. Term

- The Term of the Broker Services Agreement will be three (3) years, with two (2) one-year TAIT options to extend the agreement.
- The successful Broker must begin to market TAIT's expiring insurance coverages starting immediately and will provide TAIT's staff with final insurance coverage proposals for all insurance lines *except for health & wellness benefits programs*, no later than the **first week of June of each year for effective dates as of July 1**.
- The successful Broker will provide TAIT Human Resources with final insurance and programs coverage market proposals for all health & wellness benefits programs, no later than the **October 1 of each year, for review and approval prior to the effective dates as of January 1**.
- TAIT may, without cause, terminate the Agreement by giving 90 days written notice to the Broker.
- TAIT shall have the option, at its sole discretion, to extend this Agreement for two (2) one (1) year period(s).

6. Fees/Payment of Premiums

- Payment to the successful Broker for the performance of the services specified herein, including labor, materials, transportation and other such services, must be a fixed fee. No other charges will be allowed.

- The Broker's fee will be paid annually upon presentation of an invoice.
- All premiums for insurance placed by the Broker on behalf of TAIT shall be invoiced by the Broker upon initiation of the coverage. TAIT shall remit payment to the Broker in accordance with the specified terms and conditions of the applicable Agreement.
- All premiums shall be payable according to the terms and conditions of the insurance policy or contract.
- All premium refunds shall be paid immediately by the Broker to TAIT upon receipt of the refund by the Broker.
- The broker's only compensation will be derived from TAIT. The Broker shall not take commissions or other methods of payments from insurance companies. Please provide a flat fee with the services it covers and how it is derived. Please also include any additional services that would be an additional cost over the flat fee. All travel, lodging and miscellaneous support costs are to be included in these rates.
- In the event Broker does accept a commission, Broker must disclose to TAIT the dollar amount of any commission received as a result of coverage placed on behalf of TAIT, and identify the relationship to the insurance company providing the policy of insurance, and credit the amount of any commissions from the Broker Fee in the form a cash refund to TAIT.

7. Proposal Format and Content

TAIT has made every effort to include enough information within this RFP for a Proposer to prepare a responsive proposal. Proposals must address each of the evaluation criteria in this RFP in a clear, comprehensive, and concise manner. Proposers are further advised that lengthy or wordy submissions are not necessary.

Proposals and their sealed packaging (boxes or envelopes) should be clearly marked with the name and address of the Proposer and should be marked with the name of this RFP as indicated on page 1 of this RFP.

Proposals must be organized in the following order:

Table of Contents; Cover Letter; Executive Summary; Financial Background; Minimum Qualifications; Experience/Personnel Qualifications/Reference and Fee Structure.

Proposers must answer all questions completely and accurately and furnish all required information, data, documentation, and material failure to do so may result in disqualification of the Proposer and/or rejection of a proposal. Notwithstanding these submittal requirements, TAIT reserves the right, at its sole discretion, to waive any minor irregularity relating to the proposals.

Broker shall carefully review and address all of the evaluation factors outlined in this RFP. In

order to be considered, Broker must be able to demonstrate that it meets the minimum qualifications established in this RFP and has the ability to provide the required services as listed in Section 10 Scope of Services. Failure to provide documentation necessary to demonstrate that the Broker meets the minimum qualifications will cause the proposal to be rejected as non-responsive.

Proposals must be formatted on 8½” by 11” paper using a minimum 12 point type size. Tabs must be utilized to separate each section of the proposal. If bound, proposals must be bound on the long (left) side of the paper. The original proposal must be un-bound. The proposal must also be provided in an acrobat, pdf format. Proposals that contain erasures or alterations may be rejected.

- Table of Contents

Proposals should contain a Table of Contents. The Table of Contents outlines in sequential order, all of the areas of the proposal and it allows for clarity and ease of review of the proposal.

- Cover Letter

Each Proposer must submit a cover letter identifying the name and address of the proposing entity. The original proposal must be signed in ink by an authorized representative of the proposing entity who is authorized to execute contractual agreements and/or commitments on behalf of the Proposer.

- Executive Summary

Each proposal must contain an executive summary that summarizes the key elements of the proposal. Additionally, included in the executive summary, must be a statement that explains why the Proposer would be the best to choice for TAIT. The following information must also be provided:

- Name and address of the proposing entity (or entities).
- Telephone number(s)
- Legal structure of the organization (sole proprietor, partnership, joint venture, corporation)
- Name(s) of key individuals authorized to conduct business for the Proposer
- Financial Background Information

Proposer shall submit the following financial statements/information. If this information is not included, your proposal will not be considered for evaluation.

- a. Balance Sheets and Income Statements for the current Fiscal Year and prior two (2) Fiscal Years of operation prepared in accordance with generally accepted accounting principles and compiled by an independent Certified Public Accountant or notarized by the Chief Financial Officer or owner.
- b. Any additional information considered pertinent to indicate the Proposer’s financial and operational capabilities.

- Brief Qualifications.

8. Experience/Personnel Qualifications/References Information

Broker Qualifications and Experience - RISK

This section provides each Proposer an opportunity to outline its experience and the qualifications of its personnel. Proposer may include information in this section which differentiates its company and proposal from the other Proposers. Information provided should be concise and applicable.

Provide the following information:

- Provide the number of years Broker has been operating in the State of Oklahoma.
- Describe the Broker's local size and number of local staff.
- List the insurance markets the Broker can access.
- Provide an explanation of the Broker's experience in the airport industry.
- Describe any special experience the Broker has placing insurance coverages for a small hub airport.
- List the Broker's national networks and contacts.
- Provide any litigation or administrative proceeding in which the Broker was a party to in any matter related to the broker's professional activities during the five (5) years prior to the date of this RFP.
- Provide information regarding any pending litigation, investigations, or proceedings related to the professional activities of the broker, addressed by a state agency or court of law.
- Provide detailed insight and a description of the insurance program that TAIT will likely obtain in the current insurance market. Include a discussion on probable program structure, potential savings/increases over current rates, and market trends.
- List additional services offered by the Broker that may be of interest to TAIT.

Account Executive Qualifications and Experience - RISK

Provide a resume of the Account Executive that, at a minimum, includes the following information:

- Educational background that includes specific steps taken to remain current with trends in the insurance industry.
- Work experience that includes all past employment, number of years as an Account Executive in the insurance field and length of time in current position.
- Explanation of personal knowledge of insurance markets
- List three client references for programs that have achieved positive results due to the Account Executive's evaluation of the firm's insurance needs. Describe the results.
- Description of the Account Executive's personal book of business, including, at a minimum, the following:
- Number of accounts the Account Executive is responsible for;

- Types of accounts; and
- How TAIT's account compares in size and scope to the Account Executive's other clientele.
- Explain steps used to assure that proper attention will be given to TAIT's account as the Account Executive and Broker's book of business increases.
- List any governmental or airport clients similar to TAIT that the Account Executive represents and provide references from such clients upon request.
- Description of experience in overseeing self or partially-insured clients.
- Service Team Qualifications and Experience

Provide a resume for each service team member including any aviation specialists, involved in servicing TAIT's account that, at a minimum, includes the following information on each individual:

- Educational background that includes specific steps taken to remain current with trends in the insurance industry.
- Work experience that includes all past employment and length of time in current position.
- Personal knowledge of insurance markets
- Duties in servicing TAIT's account.
- Physical location of the service team member.
- Services and Approach to Servicing Account

Provide a written statement to describe each of the following:

- Broker's understanding, responsiveness and approach to the required services.
- Effectiveness of the Broker's proposed services.
- Broker's proposed service innovations.

Broker & Account Executive Qualifications and Experience – Health & Wellness Benefits Programs

1) Firm Overview & Market Positioning

- 1.1 Describe what makes your firm uniquely qualified to support TAIT.
- 1.2 How many public clients do you serve? Include segment definitions (size, geography) and the % of total book.
- 1.3 Describe your firm's leadership role in the employee benefits field (e.g., industry associations, published research, speaking engagements, innovation initiatives).
- 1.4 Describe your local and national market leverage within the employee benefits marketplace. Provide examples of how that leverage translates into client value (e.g., negotiated terms, vendor access, escalations).

2) Account Team & Governance

- 2.1 Provide an overview of the proposed account team (titles, roles, FTE allocation). For each member, include: qualifications, relevant certifications, and years of experience.
- 2.2 Describe your approach to ongoing training and quality assurance for client-facing staff.
- 2.3 Transition Plan: If selected, outline your 60–90 day transition plan (workstreams, milestones, dependencies, risks, and owners).

3) Strategic Services & Annual Plan Support

- 3.1 Describe your approach to supporting our programs throughout the plan year (strategy, planning, execution, evaluation).

3.2 Describe your process for competitive marketing and placement of plans, including: marketing specifications, market conditions, proposal evaluation, negotiations, and contract placement.

3.3 Explain how you manage vendor relationships (selection, SLA management, remediation, renewals) and how you coordinate across carriers, TPAs, PBMs, wellness providers, and technology vendors.

3.4 Describe your process for renewals negotiation (data inputs, carrier strategies, stop-loss considerations, targeted outcomes). Provide examples and results.

3.5 Recruitment and retention are significant considerations. How will your organization use benefits strategy to help TAIT meet or exceed talent goals? Include positioning, plan design, and employee experience.

4) Compliance & Regulatory Advisory

4.1 Do you have in-house legal advisors or retained counsel who provide benefits law guidance to clients? Describe scope and limitations.

4.2 Describe your firm's experience with Section 125, COBRA, HIPAA, ACA, ERISA, Medicare, and any state-specific regulations *as it relates to public, local, state government entities*.

4.3 Describe how you monitor and disseminate information about current trends and legislation (frequency, channels, client-tailored impact analyses).

4.4 Do you assist clients in filing Form 5500s (including SAR)? Describe your process, timelines, and data requirements.

4.5 Confirm your ability to provide/maintain:

a) Basic Wrap Document, SPD, and SMM

b) PPACA, HIPAA and ERISA participant notices

c) Basic Section 125 documents and nondiscrimination testing

e) Flex Spending Account (FSA) administration support

f) HSA administration support

4.6 Provide your HIPAA compliance posture, including Business Associate Agreement (BAA) framework and data protection practices.

5) Analytics, Actuarial & Reporting

5.1 Describe any special analyses you provide to help manage our programs (e.g., risk scoring, trend drivers, contribution strategies, plan design modeling).

5.2 What resources do you use for benchmarking (source names, frequency of refresh, normalization approach)?

5.3 Do you offer actuarial services? Describe scope (pricing, projections, stop-loss, IBNR).

5.4 Describe tools/processes to monitor healthcare and prescription drug programs (e.g., cost/utilization dashboards, high-cost claim management, specialty Rx insights).

5.5 Provide your reporting cadence and sample reports. Identify key KPIs tracked.

5.6 Will you assist with employee claim issues (advocacy, escalations)? Describe the process and typical resolution timelines.

6) Communication, Enrollment & Technology

6.1 Describe your capabilities for employee communications (print, web, mobile, video, multilingual, accessible design).

6.2 Describe your standard support during open enrollment, including on-site or virtual options, scheduling, staffing, and printed & online materials.

6.3 Describe your use of technology to support online employee services, enrollment, and education, including decision support tools and content personalization.

6.4 Describe your approach to data integrations (EDI) with carriers/administrators, eligibility file management, and error handling.

7) Wellness & Wellbeing

7.1 Do you have a dedicated wellness/wellbeing practice? Describe team, services, and vendor ecosystem.

7.2 Describe your resources for virtual healthcare assistant & benefit navigator applications and online benefits administration platforms. Provide examples of products and services offered. (TAIT currently provides access for all employees to the Healthee app with individualized plan specifics including ability to print member cards. The selected Broker must provide alternative offerings to replace the online platform as one of the first actions for this account.)

8) Special Projects

8.1 Describe your ability to travel to TAIT locations for Open Enrollment and/or other activity as needed.

8.2 Provide example implementation timelines and project governance for complex initiatives.

9) Current Vendor Interfaces (Continuity of Operations)

9.1 The following vendor relationships must continue during the current policy period (subject to future review):

- a) Blue Cross Blue Shield of Oklahoma – Medical, Dental
- b) Mutual of Omaha | EyeMed – Vision
- c) Mutual of Omaha – Basic Life, STD, LTD, Voluntary Supplemental Life, Accident, Critical Illness, Hospital Indemnities
- d) Healthee – Virtual Healthcare Assistant & Benefit Navigator
- e) WEX Health – FSA, HSA, Dependent Care FSA, Limited FSA, COBRA administration
- f) CommunityCare - Employee Assistance Plan (EAP)
- g) MetLife – Personal Legal Plans
- h) Idwatchdog from Equifax (EE only) – Identity Theft Monitoring

Describe how you will interface with these vendors, including roles, data flows, and SLA alignment.

10) References & Case Studies

11.1 Provide names and contact information for 3 comparable clients with whom TAIT may request reference conversations.

11.2 Describe at least two innovative strategic solutions implemented for clients similar to TAIT that highlight your consulting expertise. Include objectives, approach, and measurable outcomes.

11) Value-Added Services

12.1 Describe any additional service options or value-added services that may be of interest to TAIT (e.g., leave management oversight, retirement coordination, DEI-informed benefits design, dependent eligibility audits).

12) Performance Management & Customer Satisfaction

13.1 Describe your internal mechanisms for ensuring customer satisfaction (surveys, NPS, corrective action plans).

13.2 Propose SLAs and KPIs for account service, analytics, communications, and compliance support.

13.3 Provide your issue escalation and root cause analysis framework.

13) Data Security & Privacy

14.1 Provide an overview of your data security controls (access, encryption, audit logging) and any relevant certifications (e.g., SOC 2 Type II).

14.2 Describe incident response procedures and breach notification timelines.

14.3 Confirm readiness to execute HIPAA BAAs and handle PHI appropriately.

14) Required Attachments

- Sample strategic plan/calendar for a 12-month cycle
- Sample renewal marketing report and negotiation summary
- Sample compliance calendar and 5500 process guide
- Sample analytics dashboard/report
- Sample open enrollment communications suite
- BAA template
- Evidence of insurance (E&O/professional liability)
- Standard contract terms and termination clause language

9. Fee Structure

Provide the following information on the Proposal Form (Exhibit "A"):

TAIT desires to hold a fee-based contract with the Broker to ensure that the Broker has no financial stake in the selection of an insurer.

- The Broker's proposed annual fixed fee and annual escalation (if any);
- Additional fees for Brokering additional policies not included within the Scope of Services;
- Provide a detailed explanation of any ancillary services which are not included in the annual fixed fee above.

10. Scope of Services

The successful Broker must provide, at a minimum, the following insurance brokerage services and insurance coverages which are not limited to, the following:

All Plans & Programs

- A. Develop specifications for the insurance program and market the program for coverage when instructed to do so by TAIT, including completion of all applications, documents and gathering data which may be requested by insurance companies.
- B. Analyze proposals received from various insurance companies and other parties, negotiate changes for the benefit of TAIT and verify the reasonableness of the price for the coverage provided. Make recommendations to TAIT as to the most advantageous insurance program providing the highest level of coverage at the best possible price to meet TAIT's needs and objectives.
- C. Provide TAIT with a summary of various insurance program options, including but not limited to: limits, coverages, retention levels, terms, conditions, payment options and self-insurance.
- D. Provide analysis and recommendations as to the most cost-effective means for addressing TAIT's potential risks.
- E. Represent TAIT in all negotiations with insurers, underwriters and other parties with regard to the Airport's insurance programs.
- F. When instructed to do so by TAIT, administer the placement of coverage and provide original binders, policies and endorsements in a timely manner to designated staff.
- G. Provide extensive review of binders and policies including verification of conformity to specifications. Request any necessary endorsements/changes/revisions that may be required.
- H. Assure that insurance policies are placed with reputable and financially responsible insurers (based on insurance rating among other criteria), including keeping TAIT informed of any changes in rating of the insurers and making recommendations should ratings change during the policy term.
- I. Continually evaluate the insurance programs and recommend coverage changes and improvements to provide the highest level of coverage at the least possible cost to TAIT. Oversee and coordinate all relevant services performed by insurance companies/underwriters or any service agencies.
- J. Perform administrative and clerical services relative to account management, including but not limited to, issuance of certificates of insurance, and verification of the accuracy of bills, audits and all premium adjustments.
- K. Assign an Account Executive for administration of the Agreement who will be responsible for communication with TAIT's staff and who, along with any other team members assigned, must be available on a daily basis to TAIT's staff for advice and consultation on insurance program related issues and concerns.
- L. Review any related insurance company audits for accuracy.
- M. Review various insurance publications and provide TAIT with copies of articles applicable to aviation/airport insurance issues.
- N. Provide TAIT with aviation market trends on a regular basis.
- O. Coordinate (at a minimum) annual claims meetings with Airport's Designee and a representative of the underwriters.
- P. Act as TAIT's agent with carriers and claimants to resolve claims.
- Q. Consult with TAIT regarding the proposed claims counsel the insurance company plans to use with any claim.
- R. Assist with the issuance of Certificates of Insurance when requested.

- **PROPERTY / RISK SPECIFIC:**
 - S. Evaluate all properties and recommend any changes to current values.
 - T. Review loss runs quarterly, provide copies of the loss runs to Airport’s Director of Risk and advise of any anticipated problems.
 - U. Broker shall maintain lists (including but not limited to Property Schedule; Insured Vehicle Schedule; Employee Driver List and Equipment Schedule) and provide to staff upon request.
 - V. Submit all premiums/payments to carriers and other parties. All payments/premiums will be made to the selected Broker.

- **HEALTH & WELLNESS BENEFITS SPECIFIC:**
 - W. Provide access to, manage, and maintain an online benefits administration platform on behalf of TAIT.
 - X. Review programs for utilization quarterly, provide copies of the utilization reporting to Airport’s Designee and advise of any anticipated concerns with mitigation recommendations.
 - Y. Consistently maintain and allocate sufficient staffing resources that are qualified and available to provide timely technical expertise and consulting services in various specialized disciplines for TAIT’s brokerage needs.
 - Z. Provide administration support to third party vendors on behalf of TAIT (HAS/flex account management, COBRA, Healthee App, etc.).

Alternate Services

The Broker may propose additional services that Broker believes may be beneficial to TAIT. TAIT reserves the right to evaluate such proposed additional services on a case-by-case basis and to negotiate proposed costs for any such services if it is determined they should be provided.

Coverage

The Broker must be able to place coverages prior to expiration of current policies and contingent upon Trustee approval, the insurance coverage as listed below:

Coverage/Current Provider	Expiration of Current Policies
<u>Public Officials and Employment Practices Liability</u> Current Carrier: Navigators Insurance Company	June 30, 2026
<u>Property</u> Current Carrier: <u>AIG Specialty Insurance Company</u>	June 30, 2026
<u>Commercial Auto</u> Current Carrier: <u>Granite State Insurance Company</u>	June 30, 2026
<u>Employers’ Liability (Workers’ Compensation)</u> Current Carrier Milford Casualty Insurance Company	June 30, 2026
General Liability Chubb (ACE Property and Casualty Insurance Company).	June 30, 2026

Airport Owners and Operators Liability Chubb (ACE Property and Casualty Insurance Company) Named: RVS Private Hangar Tenants Insurance Group “Pooled Insurance Program”	June 30, 2026
Blue Cross Blue Shield of Oklahoma Medical/Rx	December 31, 2026
BlueCross BlueShield of Oklahoma Dental	December 31, 2026
Mutual of Omaha EyeMed Vision	December 31, 2026
Mutual of Omaha Basic Life, STD, LTD, Voluntary Supplemental Life	December 31, 2026
Mutual of Omaha Accident, Critical Illness & Hospital	
WEX Health FSA, HSA, Dependent Care FSA, Limited FSA	December 31, 2026
CommunityCare Employee Assistance Plan (EAP)	December 31, 2026
MetLife Personal Legal Plans	December 31, 2026
Idwatchdog from Equifax Identity Theft Monitoring	December 31, 2026
Healthee App Virtual Healthcare Assistant & Benefit Navigator	March 31, 2026
457(b) Retirement Nationwide	December 31, 2026
ConnectSource (via Broker) PlanSource Ben. Admin Platform	March 31, 2026

Where advantageous, TAIT would prefer to have multi-year policies with annual renewals.

Board Meeting Schedule

All policies of insurance must be approved by the board upon a recommendation from airport leadership. Board meetings are scheduled for the Second Thursday of each month.

11. Exceptions

Broker(s) must thoroughly review the RFP, its attachments and the Agreement. In the event that a Broker desires to take exception to any term or condition set forth in the RFP, its addenda (if any), or the Agreement, said exceptions must be clearly identified on a separate page titled “EXCEPTIONS”.

_____ No, the Broker has no exceptions to the RFP, its addenda (if any), or the Agreement. (This means that the Broker, if selected, is prepared to sign the Agreement).

_____ Yes, the Broker has exceptions to the RFP, its addenda (if any), or the Agreement. Proposer shall include a list of exceptions to the RFP, if any.

NOTE: If the Broker proposes changes in this Section to material terms of the RFP, its addenda (if any), or the Agreement, which are unacceptable to TAIT, the requested changes may result in an inability to finalize an agreement.

12. Required Additional Documents

Except for the Documents Required under this RFP there are no additional documents required to be submitted.

13. Pre-Proposal Meeting

A Pre-Proposal Meeting will not be held for this Request for Proposals.

14. Interviews

Interviews may be scheduled as part of the evaluation process. If the Broker is invited to interview with the Committee, the person identified as the Account Executive on this project, will play the lead role in the interview. Information from the interview, including content and style, will be part of the evaluation process, as will the reference verification. Each Broker selected for an interview may not have more than four (4) representatives attend the interview process.

15. Proposal Submission Deadline

One (1) signed original (unbound) and one (1) copy, plus one (1) electronic (pdf format) copy of the RFP responding to the information requested in this RFP must be received by TAIT no later than the deadline noted on page 1 of this RFP. Proposals must be delivered to the address indicated on page 1 of this RFP.

16. Rights Reserved

Rights Reserved: TAIT reserves the following rights:

1. To waive as an informality any minor irregularities in proposals and/or to reject any or all proposals.
2. To request additional information and data from any or all Proposers.
3. To supplement, amend, or otherwise modify the RFP through addenda issued.
4. To cancel this RFP with or without the substitution of another RFP.
5. To make such reviews and investigations as it considers necessary and appropriate for evaluation of the proposals.
6. To reject any proposal in the event that TAIT's analysis of the Proposer's financial status and capacity indicates, in TAIT's judgment, that the firm is not able to successfully perform the work.

17. Commencement of Work

This RFP does not, by itself, obligate TAIT in any way. TAIT reserves the right to cancel the award without liability at any time before the Agreement has been executed by all parties. TAIT's obligation will commence when the Agreement is executed by the Broker and subsequently approved by TAIT.

18. Authorized Signature

The authorized representative signature required on all documents associated with this RFP, including the Agreement, must be made by an officer of the company.

19. Administrative Requirements

The Airport shall not, under any circumstances, be responsible for any costs or expenses associated with the proposal submitted including, but not limited to, research, investigation, development, preparation, duplication, production, collation, packaging, delivery, transmittal, or presentation of the proposal or any other related information, data, documentation, and material. All costs and expenses incurred by the Proposer in connection with the proposal submitted shall be the sole responsibility of (borne solely by) the Proposer.

A. Public Disclosure

- a. Property of Airport: Proposals submitted to the Airport shall become the property of the Airport and shall not be returned to the Proposer.
- b. Proposals are Public Records: Pursuant to Oklahoma Open Records Act, 51. O.S. §24A et seq., proposals submitted under this RFP shall be considered public records and with limited exceptions will be available for inspection and copying by the public. Except to the extent protected by state and/or federal laws, proposals shall be considered public documents and available for review and copying by the public after an award of Contract is made by the Airport.
- c. Public Records Exemption: Any proprietary information included in the proposal that the Proposer wishes to remain confidential (to the extent allowed under the laws of the State of Oklahoma) should be clearly identified as "Confidential" in the proposal. In addition, the Proposer must provide the legal basis for the exemption to the Airport.
- d. Proposals Not Marked as Confidential: If a proposal does not clearly identify the confidential portions, the Airport will not notify the Proposer that its proposal will be made available for inspection and copying.
- e. Process for Disclosing Information: The Airport will follow the Oklahoma Open Records Act with regard to disclosure of any Confidential or Proprietary Information. The Airport will provide advance notice of such request for disclosure.

- f. Indemnification by Proposer: To the extent that the Airport withholds from disclosure all or any portion of Proposer's documents at Proposer's request, Proposer shall agree to fully indemnify, defend and hold harmless the Airport, the City and TAIT, their elected officials, agents and employees, from all damages, penalties, attorneys' fees and costs related to withholding information from public disclosure.
- g. No Claim Against Airport: By submitting a proposal, the Proposer consents to the procedure outlined in this section and shall have no claim against the Airport because of actions taken under this procedure.

B. Basic Eligibility

The successful Proposer must not be debarred, suspended, or otherwise ineligible to contract with the Airport.

20. Insurance /Indemnity & Waiver of Damages

Insurance: Prior to execution of an Agreement for services under this RFP, the successful Proposer will be required to provide acceptable evidence of insurance coverage consistent with the insurance requirements outlined in the Airport's standard Broker Services Agreement (Exhibit B). The Broker shall be required to maintain Professional Liability insurance coverage in the minimum amount of \$5,000,000 per occurrence.

Indemnity & Waiver of Damages: The successful Broker will hold TAIT, the City and the Tulsa Airport Authority, their elected and appointed officials, agents and employees, harmless from and against all suits, claims, demands, damages, actions and/or causes of action of any kind or nature in any way arising from Broker's performance under the Agreement and will pay all expenses in defending any claims made against TAIT, the City Tulsa Airport Authority, their elected and appointed officials, agents and employees, as a result of Broker's performance under the Agreement.

Binding Offer: A Broker's proposal, including Broker's fees, will remain valid for a period of 120 days following the proposal deadline and will be considered a binding offer to perform the required services, assuming all terms are satisfactorily negotiated. The submission of a proposal shall be taken as prima facie evidence that the Broker has familiarized itself with the contents of this RFP.

Authority: Broker, its agents, employees and representatives must be authorized to conduct business under all laws, codes and regulations of the State of Oklahoma, including the Office of the Insurance Commissioner. Broker must be fully authorized to provide insurance services to public entities and municipal corporations of the State of Oklahoma.

Compliance: Broker shall comply with all Board, local, State and federal directives, orders, policies and laws as applicable to this RFP and subsequent Agreement.

Collusion: More than one proposal from the same Broker under the same or different names will not be considered. Reasonable grounds for believing that a Broker is submitting more than one

proposal will cause the rejection of all proposals in which Broker is involved. Those proposals will be rejected if there is reason for believing that collusion exists among Brokers, and no participant in such collusion will be considered in any future proposals for the provision of services for the next six months following the date of the proposal submission.

21. General Information

Proposal Evaluation and Selection Criteria: Written proposals will be evaluated based upon the following criteria (the weighting or value associated with each element has been identified following the criteria to give Proposers an idea of the relative importance of each element to TAIT):

Objective: It is TAIT's intention to solicit proposals from potentially qualified Brokers; to evaluate said proposals; to negotiate terms and fees; and to award an agreement to the Broker whose proposal is determined to serve in the best interest of TAIT.

Evaluation and Recommendation: An evaluation committee (“Committee”) will consist of TAIT staff members. TAIT reserves the right to request additional information and clarification of any information submitted, including any omission from the original proposal. All proposals will be treated equally with regard to this item.

The evaluation will be based on the comparative fulfillment of the criteria where zero (0) is non-responsive and 10 is the highest score. Total scoring is a mathematical extension of the criteria score times weight. The following evaluation criteria have been established to determine which Broker will best contribute to the overall goals of TAIT.

#	Element	Weight or Value
1	Broker Organization-Qualifications and	35%
2	Account Executive’s Qualifications and	25%
3	Services and Approach to Servicing Account	10%
4	Fee Structure	20%
5	Interviews & References	10%

Selection: The final selection and approval of the successful Broker will be made by TAIT in accordance with its competitive selection process. The Committee will evaluate proposals on the basis of the guidelines set forth in this RFP and will present its findings to TAIT Trustees. The Agreement will be approved at a regularly scheduled board meeting as soon as practical after award.

Negligence or omission on the part of the Broker or any party preparing any portion of the proposal confers no right to withdraw or make changes, additions, or deletions to the proposal after the proposal submission deadline.

TAIT reserves the right to modify the solicitation schedule during the RFP process. Proposers are responsible for checking the website prior to submission of proposals for any addenda.

Agreement Execution: TAIT will provide to the successful Broker(s) two originals of the Insurance Broker Services Agreement for execution. The Broker(s) agrees to deliver two duly executed original Agreements to TAIT.

END.

Exhibit A – Proposal Form

Proposer is bound by its written proposal for a period of Thirty (30) days following the date of proposal opening and may not withdraw its offer during this period. It is understood by the Proposer that the Tulsa Airports Improvement Trust reserves the right to reject any and all written proposals.

Each proposer **MUST** present a fixed cost proposal for the work to be performed. Fees will be guaranteed for the full term of this agreement and should include all costs. Cost Data for “Other Risk Management Services” can be included in the overall fee or based on and identified as “usual and customary” if desired. Either way, it is the desire of the TAIT to have those services identified. It is the intent of the TAIT to have as many services provided covered under the “Base Brokerage Services”.

Contract Years	Year One	Year Two	Year Three
Brokerage Services Annual Fee	\$ _____	\$ _____	\$ _____

Please include on a separate page any fixed price quotes for other risk management services (outside the Scope of this Agreement) the Proposer would like the airport to consider.

Exhibit B – Sample Insurance Broker Services Agreement – attached separately.

Exhibit C – Proposal Submission Checklist

PROPOSAL SUBMISSION CHECKLIST

This checklist should be used by the Bidder to ensure the Bid Packet and all forms have been completed per the instructions prior to submission of Bid.

	Cover Letter
	Executive Summary
	Identification of Proposer.
	Qualifications and Experience.
	Financial Information.
	Exhibit A - Proposal Form.
	Exhibit B – Acknowledgement of Terms and Conditions of Sample Agreement.
	Exhibit C – Proposal Submission Checklist.
	Exhibit D – Non Collusion Affidavit.
	Exhibit E – Vendor Registration.
	Exhibit F – Acknowledgement of Addenda (if any).
	Exhibit G – Property Valuation.

PLEASE ACKNOWLEDGE ABOVE INFORMATION/DOCUMENTS ARE INCLUDED IN OR WITH THE WRITTEN PROPOSAL.

Signature: _____ Date: _____

[NOTARY SEAL]

Notary Public

Exhibit E – Vendor Registration

Tulsa Airports Improvement Trust Vendor Registration

**FEDERAL TAXPAYER IDENTIFICATION
NUMBER
OR
SOCIAL SECURITY NUMBER**

Print full company or individual Name: _____

Certification: Under Penalties of Perjury, I certify that:

- (1) The TIN or SS number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and,
- (2) I am not subject to backup withholding because (a) I am exempt from backup withholding or (b) I have not been notified by the IRS that I am subject to backup withholding as a result of failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and,
- (3) I am a U.S. person (including a U.S. resident alien).

Certification Instructions: You must cross out item (2) above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply

Sign here: _____ Date: _____

Circle all that apply:

- | | | |
|----------------------------------|------------------------------------|------------------------------|
| Sole Proprietor/Individual Owned | Medical Provider | New Vendor |
| Partnership | Corporation | One-Time Vendor |
| Limited Liability Company | Non-Profit – (Per IRS 501C3 regs.) | Address Change |
| Lawyer / Attorney | Government | Federal Tax ID Number Change |

Payment Remittance Address:

Name as shown on your income tax return:

Business Name, if different from above:

Street or P.O. Box

City, State, Zip

Contact Person _____

Email Address _____

Telephone Number _____

Exhibit F – Acknowledgement of Addenda

Acknowledgement of Addenda

I hereby acknowledge receipt of the following addenda or amendments, and understand that such addenda or amendments are incorporated into the Bid Packet and will become a part of any resulting Purchase Agreement.

List Date and Title/Number of all addenda or amendments: (Write “None” if applicable).

Company: _____

Signature: _____

Title: _____

Date: _____

Exhibit G – Property Valuation – Attached Separately.

Exhibit H – Quarterly Project Summary – Attached Separately.

Exhibit I - Required Federal Provisions – Attached Separately.