

REQUEST FOR LEGAL SERVICES

To: County Attorney's Office
Attention: Sandi Howard

From: Steve McMillan Drawer No.

Dept: Facilities Management Division Ext. 5527

Date: October 26, 2023

Request (in detail): _____

Request for review and approval of processing CSA for CRA A&E services for the expansion of the existing Tourism and Sports Marketing Headquarters Office Building

Please indicate any time limits involved and attach all necessary documentation.

County Attorney

For County Attorney office use only:

Assign to: Sandi

OCT 31 2023

Date: _____

County Attorney Project No.: 2023-691

Logged out: 10/31/23 JH

clear fields

CONSULTANT APPROVAL FORM

CPO: If Consultant fee is under \$50,000 & construction is under \$250,000 (procedure)
CSA: If Construction is under \$4,000,000;
OR for study activity if consultant fee is under \$500,000- FS 287.055(CCNA))

CPO/CSA #: 2021-033-01 (Assigned by Procurement)

Modification of CPO 2021-033-B

To be completed by the requesting Division:

Date: 8/17/2023 Division: Facilities Management Division

Project Manager's Name: Rob Williams Phone #: _____

863-534-5568 Project Name: Polk County Tourism Office Expansion

Total Project Budget: \$2,500,000.00 Project #1300008

Estimate of Construction Cost: \$2,112,240.25

Proposed Consultant: Clemons, Rutherford & Associates, Inc. Fee: \$199,845.00 \$28,435(CPO 2021-033-B) +
Total: \$ 228,280.00

Master Consultant Agreement # 2021-033

Attach Scope of Services Proposed by the Consultant (Exhibit "A")

Approved By: [Signature] Date 8/30/23
Division Director/Designee

Procurement Division

Date Received: 8/30/23 Date Reviewed by Analyst: 8/30/23 - TS

Approved by: [Signature] Final Review with
all documents - (TS)
10/30/23
(Procurement Director/Designee)

County Attorney's Office (Required for all CSA's)

Date Received: 10/31/23 Date Reviewed: 10/3/23

Approved by: [Signature]
(County Attorney Office Signature)

County Manager's Office (Required if consultant fee is greater than \$100,000)

Date Received: _____ Date Reviewed: _____

Approved by: _____
(County Manager Office Signature)

Additional Attachments: number of days to complete project, not to exceed/lump sum amount, justification for consultant selected, fee schedule, and Professional Liability COI (COI applicable to CSA only, description field must be project specific (contract requirement)).



Consultant Services Authorization

| | |
|-----------------------------------|--|
| Firm | Clemons, Rutherford & Associates, Inc. |
| Master Agreement No. | 2021-033 |
| CSA No. | 2021-033-01 |
| Project Name | Polk County Tourism and Sports Marketing Building Expansion |
| Project Description | Design, Permitting & Construction Administration Services for a Polk County Tourism and Sports Marketing Building Expansion |
| Projects Exhibits and Attachments | Exhibit "A"- Scope of Services Exhibit "B"-Fee Schedule (Master Agreement) Exhibit "C"-Reimbursable Cost Schedule Exhibit "D"-Insurance Documents |
| Duration (in days) | Upon Project Completion |
| Compensation | \$ 199,845.00 Lump Sum |
| Special Contract Conditions | N/A |
| Insurance Requirements | Professional Liability |
| Liquidated Damages | \$ N/A Per Day |
| Budget Source/Availability | 12161.130552035.5662030-1300008 |

IN WITNESS WHEREOF, the parties hereto have executed this CSA on this ____ day of _____, 20__.

Attest:
STACY M. BUTTERFIELD

POLK COUNTY, a Political subdivision
of the State of Florida

By: _____
Deputy Clerk

By: _____
Chairman
Board of County Commissioners

Date Approved by Board: _____

Review as to form and legal sufficiency
Jander B. Hou 10/31/23
County Attorney's Office Date

Attest:

Clemons, Rutherford & Associates, Inc.
CONSULTANT COMPANY NAME

[Signature]
Corporate Secretary

Authorized Corporate Officer
[Signature]
William D. Rutherford, President

SEAL

Date: 10-25-2023

Date: 10-25-2023



October 27, 2023

Polk County Board of Co. Commissioners
2160 Marshall Edwards Dr.
Bartow, FL 33830

**RE: Polk County, Tourism & Sports Marketing Building
Building Expansion
CRA Fee Proposal – Design/CA Services**

Dear Mr. McMillian,

We appreciate the opportunity to offer design services for the Tourism & Sports Marketing Building Expansion Project. This project is a result of the expansion study Clemons, Rutherford & Associates Inc. (CRA) performed under CPO 2021-033-B in the amount of \$28,435.00. The study has been completed and CRA has determined that it is feasible to proceed with the expansion of the Tourism facility. This CSA is a modification of CPO 2021-033-B to proceed with the design, bidding, and construction of the expansion as further described below.

Project General Description

Location: Polk County, FL
2701 Lake Myrtle Park Rd.
Auburndale, FL 33823

Size: ≈ 3,200 SF Expansion/Addition, 1,700 SF Renovation/Infill

Budget: Project budget \$2,500,000

Summary Scope of Services/Deliverables:

The below list is a summary of the services and deliverables expected.

- Discuss and confirm with client decision from predesign effort.
- Include all architectural, civil, structural, mechanical, electrical, and plumbing design and engineering.
- Meet with client to review documents at advanced schematics, design development, and construction document phases.
- Final signed and sealed documents to be submitted to AHJ and will respond to comments.
- Assist in review of pricing/bidding from contractors/CM
- Provide Contract administrative services.
 - o Site visits to review progress of the work and compliance with contract documents.
 - o Pay application reviews
 - o Shop drawings and product data review
 - o Substantial/Final Inspection
 - o Review project closeout documents

Preliminary Schedule (Schedule to be evaluated and solidified at Kick-Off meeting)

- Kick off meeting
- Advanced Schematic design phase 3 weeks

| | |
|---------------------------------------|---------------------|
| - Owner review | 1 week |
| - Design development phase | 6 weeks |
| - Owner review | 1 week |
| - Construction documents..... | 5 week |
| - Owner review and approval..... | 1 week |
| - GC/CM award and NTP..... | 6 weeks |
| - Construction | <u>12 months</u> |
| Total estimated duration | 17.75 months |

Fees:

Basic Services, Lump Sum: \$168,500.00

See attached for hourly breakdown. Includes expenses.

Consultant Services

- Creation of CAD base drawings of existing tie-in area
- Civil design and permitting assistance (GADD & Associates)
- Interior design, color boards and color selection
- Energy form

Consultant Services Total, Lump Sum: \$ 26,345.00

Additional Service Allowance (undefined): \$ **5,000.00**

Total Services: \$199,845.00

We look forward to your review and approval of this proposal. If you need any additional information or have any questions regarding the proposal, please do not hesitate to contact me.

Sincerely,



James Lewis
 Production Manager / Architect
 LEED AP

Competitive Negotiations - Detailed Analysis of Fee

Name of Firm: Clemons, Rutherford & Assoc.
 Project Number: #
 Project Name: Tourism and Sports Marketing Bldg - Expansion

10/25/2023

Basic Services

| CRA | Position | Rate | Hours | | Cost | | Basic Services - Consultant Coordination, Review, Facilitation | | Basic Services - Design Services | | Basic Services - Contract Administration Services | | Total Fee |
|--|---------------------|--------|-------|------------|-------|--------|--|-------------|-------------------------------------|-------------|--|-------------|---------------------|
| | | | Hours | Cost | Hours | Cost | Hours | Cost | Hours | Cost | Hours | Cost | |
| | PM/Architect (BR) | \$185 | | \$0 | | \$0 | | \$0 | 4 | \$740 | 1 | \$185 | \$925 |
| | PM/Architect (IL) | \$185 | | \$0 | | \$0 | 10 | \$1,850 | 6 | \$1,110 | 2 | \$370 | \$3,330 |
| | PM/Architect (WR) | \$185 | | \$0 | | \$0 | 50 | \$9,250 | 220 | \$40,700 | 10 | \$1,850 | \$51,800 |
| | Assisting PM | \$140 | | \$0 | | \$0 | | \$0 | | \$0 | 4 | \$560 | \$560 |
| | Project Designer | \$165 | | \$0 | | \$0 | | \$0 | 20 | \$3,300 | | \$0 | \$3,300 |
| | Proj. Int. Designer | \$160 | | \$0 | | \$0 | | \$0 | 20 | \$3,200 | | \$0 | \$3,200 |
| | Plans Review/Insp. | \$140 | | \$0 | | \$0 | | \$0 | 4 | \$560 | | \$0 | \$560 |
| | Const. Admin | \$145 | | \$0 | | \$0 | | \$0 | 4 | \$580 | 90 | \$13,050 | \$13,630 |
| | Estimator | \$135 | | \$0 | | \$0 | | \$0 | 4 | \$540 | | \$0 | \$540 |
| | Spec. Writer | \$115 | | \$0 | | \$0 | 9 | \$1,035 | 48 | \$5,520 | | \$0 | \$6,555 |
| | BIM/3D Drafting | \$115 | | \$0 | | \$0 | | \$0 | | \$0 | | \$0 | \$0 |
| | Drafting Sr. | \$100 | | \$0 | | \$0 | | \$0 | 30 | \$3,000 | 0 | \$0 | \$3,000 |
| | Drafting Jr. | \$80 | | \$0 | | \$0 | | \$0 | 40 | \$3,200 | 4 | \$320 | \$3,520 |
| | Clerical/Support | \$80 | | \$0 | | \$0 | | \$0 | 20 | \$1,600 | 16 | \$1,280 | \$2,880 |
| | Printing exp | | | \$0 | | \$0 | | \$0 | | \$1,500 | | \$0 | \$1,500 |
| Arch SubTL | CRA | Sub TL | | \$0.00 | | \$0.00 | | \$12,135.00 | | \$65,550.00 | | \$17,615.00 | \$95,300.00 |
| Consultants Basic Services | | | | | | | | | | | % Mark-up | | |
| Structural | JAE | Sub TL | | | | | | | | \$15,400.00 | 0.0% | \$0.00 | \$15,400.00 |
| MEP | H2Engineering | Sub TL | | | | | | | | \$42,000.00 | 0.0% | \$0.00 | \$42,000.00 |
| Trips | | | | | | | | | | | | | |
| | | | Qty | Rate | | | | | | | | | |
| CRA | Design 2 & CA 4 | | 6 | \$1,800.00 | | | | | | \$10,800.00 | 0.0% | \$0.00 | \$10,800.00 |
| JAE | Design 1 & CA 0 | | 1 | \$2,000.00 | | | | | | \$2,000.00 | 0.0% | \$0.00 | \$2,000.00 |
| H2E | Design 1 & CA 1 | | 2 | \$1,500.00 | | | | | | \$3,000.00 | 0.0% | \$0.00 | \$3,000.00 |
| Total Basic Services including Expenses | | | | | | | | | | | | | \$168,500.00 |
| Total Consultant Services | | | | | | | | | | | | | \$26,345.00 |
| Total Basic and Consultant Services | | | | | | | | | | | | | \$194,845.00 |

Competitive Negotiations - Detailed Analysis of Fee

Name of Firm: Clemons, Rutherford & Assoc.
 Project Number: #
 Project Name: Tourism and Sports Marketing Bldg - Expansion

10/25/2023

Services

| In-house Services | | | Interior Design | | Architectural CAD Existing Base Drawings | | 3D Modeling - Not Provided | | TBD | | TBD | | Total Fee |
|-------------------|---------------------|--------|-----------------|---------|--|---------|----------------------------|-----|-----|-----|-----|-----|-------------------|
| CRA | Position | Rate | Hours | Cost | Hours | Cost | | | | | | | |
| | PM/Architect (BR) | \$185 | | \$0 | | \$0 | | \$0 | | \$0 | | \$0 | |
| | PM/Architect (JL) | \$185 | | \$0 | | \$0 | | \$0 | | \$0 | | \$0 | |
| | PM/Architect (WR) | \$185 | 4 | \$740 | 2 | \$370 | | \$0 | | \$0 | | \$0 | |
| | Assisting PM | \$140 | | \$0 | | \$0 | | \$0 | | \$0 | | \$0 | |
| | Project Designer | \$165 | | \$0 | | \$0 | | \$0 | | \$0 | | \$0 | |
| | Proj. Int. Designer | \$160 | 32 | \$5,120 | | \$0 | | \$0 | | \$0 | | \$0 | |
| | Plans Review/Insp. | \$140 | | \$0 | | \$0 | | \$0 | | \$0 | | \$0 | |
| | Const. Admin | \$145 | | \$0 | | \$0 | | \$0 | | \$0 | | \$0 | |
| | Estimator | \$135 | | \$0 | | \$0 | | \$0 | | \$0 | | \$0 | |
| | Spec. Writer | \$115 | | \$0 | | \$0 | | \$0 | | \$0 | | \$0 | |
| | BIM/3D Drafting | \$115 | | \$0 | | \$0 | | \$0 | | \$0 | | \$0 | |
| | Drafting Sr. | \$100 | | \$0 | 4 | \$400 | | \$0 | | \$0 | | \$0 | |
| | Drafting Jr. | \$80 | | \$0 | 16 | \$1,280 | | \$0 | | \$0 | | \$0 | |
| | Clerical/Support | \$80 | | \$0 | | \$0 | | \$0 | | \$0 | | \$0 | |
| | Expenses | | | \$95 | | \$95 | | \$0 | | \$0 | | \$0 | |
| Sub TL CRA | | Sub TL | | \$5,955 | | \$2,145 | | \$0 | | \$0 | | \$0 | \$8,100.00 |

| Consultants Services | | Est. Fee | Trip Qty | Fee Ea. | TL Trips | | | | Sub Total | % | Mark-up | Total |
|----------------------|---------------------------|----------|----------|---------|----------|--|--|--|-----------|------|---------|--------------------|
| Structural - JAE | N/A | \$0 | N/A | | | | | | \$0 | 0.0% | \$0 | \$0.00 |
| Owner - Polk | Land Survey | By Owner | N/A | | | | | | \$0 | 0.0% | \$0 | \$0.00 |
| Owner - Polk | Fire Flow Test | By Owner | N/A | | | | | | \$0 | 0.0% | \$0 | \$0.00 |
| Owner - Polk | Geotechnical | By Owner | N/A | | | | | | \$0 | 0.0% | \$0 | \$0.00 |
| Owner | Permitting Fees | By Owner | N/A | | | | | | \$0 | 0.0% | \$0 | \$0.00 |
| Gadd & Assoc | Civil | \$17,500 | N/A | | | | | | \$17,500 | 0.0% | \$0 | \$17,500.00 |
| Owner - Polk | Commissioning | By Owner | N/A | | | | | | \$0 | 0.0% | \$0 | \$0.00 |
| Owner - Polk | FF&E | By Owner | N/A | | | | | | \$0 | 0.0% | \$0 | \$0.00 |
| H2E | Energy Form | \$745 | N/A | | | | | | \$745 | 0.0% | \$0 | \$745.00 |
| Owner | Data Cabling | By Owner | N/A | | | | | | \$0 | 0.0% | \$0 | \$0.00 |
| A/E Team | Record Drawings | N/A | N/A | | | | | | \$0 | 0.0% | \$0 | \$0.00 |
| A/E Team | 11-month inspection - N/A | N/A | N/A | | | | | | \$0 | 0.0% | \$0 | \$0.00 |
| Total | | | | | | | | | | | | \$26,345.00 |



CLEMONS, RUTHERFORD & ASSOCIATES, INC.

ARCHITECTS | PLANNERS | INTERIOR DESIGNERS | CONSTRUCTION MANAGERS

2027 Thomasville Road, Tallahassee, Florida 32308

p: 850-385-6153 | f: 850-386-8420 | www.craarchitects.com

**Exhibit A
HOURLY RATES**

The basic hourly rates for all architectural and interior design discipline are listed below.

| | |
|---|---------------|
| Project Manager/Architect | 185.00 |
| Assisting Project Manager | 140.00 |
| Project Designer | 165.00 |
| Project Interior Designer | 160.00 |
| Construction Administrator | 145.00 |
| Plans Review and Inspection..... | 140.00 |
| Estimator | 135.00 |
| Educational Surveyor | 130.00 |
| Specification Writer..... | 115.00 |
| BIM / 3D Drafting:..... | 115.00 |
| Drafting: Senior | 100.00 |
| Junior | 80.00 |
| Clerical/Support Services | 80.00 |



EXHIBIT C

SCHEDULE OF REIMBURSABLES

| | | |
|--|--------------|------------------|
| 1. Reproduction Cost | | |
| A. Regular Copying..... | Single Side | Double Sided |
| 8 ½ x 11 (black & white)..... | \$ 0.15/page | \$ 0.25/sheet |
| 8 ½ x 11 (color)..... | \$ 0.30/page | \$ 0.40/sheet |
| 8 ½ x 14 (black & white)..... | \$ 0.15/page | \$ 0.25/sheet |
| 8 ½ x 14 (color)..... | \$ 0.30/page | \$ 0.40/sheet |
| 11 x 17 (black & white)..... | \$ 0.25/page | \$ 0.35/sheet |
| 11 x 17 (color)..... | \$ 0.40/page | \$ 0.50/sheet |
| 9 ½ x 24 Single Side Only..... | \$ 1.00/page | |
| 17 x 22 Single Side Only..... | \$ 2.00/page | |
| 18 x 24 Single Side Only..... | \$ 2.00/page | |
| 24 x 36 Single Side Only..... | \$ 3.00/page | |
| 30 x 30 Single Side Only..... | \$ 5.00/page | |
| 32 x 34 Single Side Only..... | \$ 5.00/page | |
| Other sizes-per square inch..... | \$ 0.03/page | |
| Compact Digital Disk..... | \$ 6.00/disk | |
| B. Blueprint Copy..... | | \$10.00/page |
| 2. Subcontractor Services | | Actual Costs |
| 3. Special Consultants | | Actual costs |
| 4. Telecommunications | | Non-reimbursable |
| 5. Computer Services | | Non-reimbursable |
| 6. Pre-approved Travel Expenses In accordance with Chapter 112.061, F.S.; and further defined in the Polk County Employee Handbook | | |
| 7. Postage, Fed Express, UPS | | Actual Costs |
| 8. Pre-approved Equipment (includes purchase and rental of equipment used in project) | | Actual Costs |

AM Best Rating Services

The Charter Oak Fire Insurance Company

Bestlink  AMB #: 002516 NAIC #: 25615 FEIN #: 060291290

Domiciliary Address

One Tower Square
Hartford, Connecticut 06183
[United States](#)

Web: www.travelers.com

Phone: 860-277-0111

Fax: 844-816-9447

AM Best Rating Unit: [AMB #: 018674 - Travelers Group](#)

Assigned to insurance companies that have, in our opinion, a superior ability to meet their ongoing insurance obligations.



View additional [news, reports and products](#) for this company.

Based on AM Best's analysis, [058470 - The Travelers Companies, Inc.](#) is the **AMB Ultimate Parent** and identifies the topmost entity of the corporate structure. View a list of [operating insurance entities](#) in this structure.

Best's Credit Ratings

Financial Strength View Definition

| | |
|----------------------------------|----------------|
| Rating (Rating Category): | A++ (Superior) |
| Affiliation Code: | g (Group) |
| Outlook (or Implication): | Stable |
| Action: | Affirmed |
| Effective Date: | July 20, 2023 |
| Initial Rating Date: | June 30, 1936 |

Long-Term Issuer Credit View Definition

| | |
|----------------------------------|----------------|
| Rating (Rating Category): | aa+ (Superior) |
| Outlook (or Implication): | Stable |
| Action: | Affirmed |
| Effective Date: | July 20, 2023 |
| Initial Rating Date: | April 18, 2005 |

Financial Size Category View Definition

Financial Size Category: XV (Greater than or Equal to USD 2.00 Billion)

u Denotes [Under Review Best's Rating](#)

Best's Credit Rating Analyst

Rating Office: A.M. Best Rating Services, Inc.

Associate Director : Kathryn Steffanelli

Senior Director: Michael J. Lagomarsino, CFA, FRM

Note: See the Disclosure information Form or Press Release below for the office and analyst at the time of the rating event.

Disclosure Information

Disclosure Information Form

View AM Best's [Rating Disclosure Form](#)

Press Release

[AM Best Affirms Credit Ratings of The Travelers Companies, Inc. and Most Subsidiaries](#)
July 20, 2023

Rating History

AM Best Rating Services

Travelers Property Casualty Company of America

BestLink  AMB #: 004461 NAIC #: 25674 FEIN #: 362719165

Domiciliary Address

One Tower Square
Hartford, Connecticut 06183
[United States](#)

Web: www.travelers.com

Phone: 860-277-0111

Fax: 844-816-9447

Assigned to insurance companies that have, in our opinion, a superior ability to meet their ongoing insurance obligations.



AM Best Rating Unit: [AMB #: 018674 - Travelers Group](#)

View additional [news, reports and products](#) for this company.

Based on AM Best's analysis, [058470 - The Travelers Companies, Inc.](#) is the **AMB Ultimate Parent** and identifies the topmost entity of the corporate structure. View a list of [operating insurance entities](#) in this structure.

Best's Credit Ratings

Financial Strength View Definition

Rating (Rating Category): A++ (Superior)
Affiliation Code: g (Group)
Outlook (or Implication): Stable
Action: Affirmed
Effective Date: July 20, 2023
Initial Rating Date: June 30, 1972

Best's Credit Rating Analyst

Rating Office: A.M. Best Rating Services, Inc.
Associate Director : Kathryn Steffanelli
Senior Director: Michael J. Lagomarsino, CFA, FRM
Note: See the Disclosure information Form or Press Release below for the office and analyst at the time of the rating event.

Long-Term Issuer Credit View Definition

Rating (Rating Category): aa+ (Superior)
Outlook (or Implication): Stable
Action: Affirmed
Effective Date: July 20, 2023
Initial Rating Date: April 18, 2005

Disclosure Information

Disclosure Information Form

View AM Best's [Rating Disclosure Form](#)

Press Release

[AM Best Affirms Credit Ratings of The Travelers Companies, Inc. and Most Subsidiaries](#)
July 20, 2023

Financial Size Category View Definition

Financial Size Category: XV (Greater than or Equal to USD 2.00 Billion)

u Denotes [Under Review Best's Rating](#)

Rating History

AM Best Rating Services

Zenith Insurance Company

BestLink  AMB #: 087124

Domiciliary Address

105 Adelaide Street West Suite 700
Toronto, Ontario M5H 1P9
Canada

Web: www.trushieldinsurance.ca

Phone: 416-350-3000

Fax: 416-350-4307

AM Best Rating Unit: [AMB #: 051178 - Northbridge Financial Corporation](#)

Assigned to insurance companies that have, in our opinion, an excellent ability to meet their ongoing insurance obligations.



View additional [news reports and products](#) for this company.

Based on AM Best's analysis, [058364 - Fairfax Financial Holdings Limited](#) is the AMB Ultimate Parent and identifies the topmost entity of the corporate structure. View a list of [operating insurance entities](#) in this structure.

Best's Credit Ratings

Financial Strength View Definition

Rating (Rating Category): A (Excellent)
Affiliation Code: g (Group)
Outlook (or Implication): Stable
Action: Affirmed
Effective Date: August 17, 2023
Initial Rating Date: November 08, 1999

Best's Credit Rating Analyst

Rating Office: A.M. Best Rating Services, Inc.
Financial Analyst: Christopher Pennings
Senior Financial Analyst: Dan Hofmeister, CFA, FRM, CAIA, CPCU, ARe, AIS, AIAF
Note: See the Disclosure Information Form or Press Release below for the office and analyst at the time of the rating event.

Long-Term Issuer Credit View Definition

Rating (Rating Category): a+ (Excellent)
Outlook (or Implication): Stable
Action: Upgraded
Effective Date: August 17, 2023
Initial Rating Date: June 28, 2005

Disclosure Information

Disclosure Information Form

View AM Best's [Rating Disclosure Form](#)

Press Release

[AM Best Upgrades Issuer Credit Ratings of Northbridge Financial Corp's Members and Affirms Ratings of Wentworth Ins Co Ltd](#)
August 17, 2023

Financial Size Category View Definition

Financial Size Category: XV (Greater than or Equal to USD 2.00 Billion)

u Denotes [Under Review Best's Rating](#)

Rating History

AM Best Rating Services

Continental Casualty Company

BestLink  AMB #: 002128 NAIC #: 20443 FEIN #: 362114545

Domiciliary Address
151 North Franklin Street
Chicago, Illinois 60606
[United States](#)

Web: www.cna.com
Phone: 312-822-5000

AM Best Rating Unit: [AMB #: 018313 - CNA Insurance Companies](#)

Assigned to insurance companies that have, in our opinion, an excellent ability to meet their ongoing insurance obligations.



View additional [news, reports and products](#) for this company.

Based on AM Best's analysis, [050177 - Loews Corporation](#) is the **AMB Ultimate Parent** and identifies the topmost entity of the corporate structure. View a list of [operating insurance entities](#) in this structure.

Best's Credit Ratings

Financial Strength View Definition

Rating (Rating Category): A (Excellent)
Outlook (or Implication): Stable
Action: Affirmed
Effective Date: August 17, 2023
Initial Rating Date: June 30, 1922

Best's Credit Rating Analyst

Rating Office: A.M. Best Rating Services, Inc.
Senior Financial Analyst: Elizabeth Blamble
Associate Director : Alan Murray
Note: See the Disclosure information Form or Press Release below for the office and analyst at the time of the rating event.

Long-Term Issuer Credit View Definition

Rating (Rating Category): a+ (Excellent)
Outlook (or Implication): Stable
Action: Affirmed
Effective Date: August 17, 2023
Initial Rating Date: June 21, 2005

Disclosure Information

Disclosure Information Form
View AM Best's [Rating Disclosure Form](#)

Press Release
[AM Best Affirms Credit Ratings of CNA Financial Corporation and Its Subsidiaries](#)
August 17, 2023

Financial Size Category View Definition

Financial Size Category: XV (Greater than or Equal to USD 2.00 Billion)

u Denotes [Under Review Best's Rating](#)

Rating History

AM Best has provided ratings & analysis on this company since 1922.