



PRE-BID CONFERENCE

IFB 1-18-C087

IFB 8-18-C002

Insurance Broker Services

March 9, 2018, 10 AM - Conference Room 5 C/D



Item	Presenter	Time
Introductions	Contracting Officers	5 minutes
Rail Project	Contracting Officer	5 Minutes
Solicitation Information and Requirements	Contracting Officers	10 minutes
Statement of Work	Contracting Officer Technical Representative	10 minutes
Local Disadvantaged Business Enterprise (LDBE) Requirements and Disadvantage Business Enterprise (DBE) Goal	Department of Supplier Diversity	5 minutes
Federal Provisions	Contracting Officer	5 minutes
Question and Answers	All	15 minutes



Disclaimer

The information contained in this presentation is for informational purposes only.

In the event of a discrepancy between the information contained herein and the IFB documents, the IFB documents will take precedence.



INTRODUCTION

- Today's Presentation covers two Solicitations:
 - 1-18-C087 Insurance Broker Services - Aviation
 - 8-18-C002 Insurance Broker Services - Rail Project
- Each Solicitation is separate. A proposer may submit a proposal for 1-18-C087 or 8-18-C002 or both.
- Submission of a proposal for the Aviation Services will not be considered as submission of a proposal for Rail Project Services.
- The Solicitation for 8-18-C002 has several different provisions than Solicitation 1-18-C087. These differences will be discussed later in this presentation.



RAIL PROJECT

- Extension of the WMATA Metrorail System
- Two Phases - Currently in Phase 2
- Rail Project includes Federal funds requiring the procurement to comply with FTA requirements.



RAIL PROJECT

- Rail Solicitation includes the following:
 - Zero (0%) percent DBE participation goal, however DBE participation is encouraged.
 - DBE Voluntary Participation Requirement (Section VIII). If Contractors are proposing DBE Participation, they must submit all DBE requirements and will be held responsible for meeting their DBE goal.
 - Section IV of the Solicitation (Reps and Certs) includes the FTA certification requirements
 - Section X, Attachment 5, (Federal Requirements). These requirements must be submitted with the Technical Proposal



Summary of Solicitation

- Procurement Method: 2-Step IFB
 - Step 1: Evaluation of the technical proposals based on evaluation criteria
 - Step 2: Only offerors who submitted a **passing** technical proposal in Step 1 will be asked to submit priced bids

Aviation Proposals and Rail Proposals will be evaluated separately.

- Performance Period: Three (3) year base period from the effective date of the contract and two (2) one-year options, exercised at the discretion of the Authority
- Anticipated **ESTIMATED** Contract Award: July 2018
- Contract Type: Combined Firm Fixed Unit Price
- Contractors are encouraged to ask questions or get clarifications to the Terms and Conditions or Statement of Work during the Q&A period. **Material changes to the Terms and Conditions are non-negotiable.**



On-Line Resources

- The Pre-Proposal Conference Attendees List and this presentation will be posted to the Airports Authority website.
- All questions must be submitted through the Airports Authority website by 3 PM, March 12, 2018.
- Answers to all questions received will be posted online, and all registered Planholders will be notified.



Planholder List – 1-18-C087

PLANHOLDER LIST FOR SOLICITATION 1-18-C087 INSURANCE BROKER SERVICES

CONTRACTOR NAME	PRIMARY CONTACT	STREET ADDRESS	CITY, STATE, ZIP	PHONE NUMBER	FAX NUMBER	HOW FIRM INTENDS TO PARTICIPATE IN SOLICITATION				
						PRIME	J.V.	SUB	SUPPL.	OTHER
1. ALLIANT INSURANCE SERVICES	MARCUS BEVERLY	2180 HARVARD STREET, SUITE 460	SACRAMENTO, CA 95815	916-643-2704	916-643-2700	X				
2. ARTHUR J. GALLAGHER & COMPANY	RICHARD TERLECKI	200 SOUTH ORANGE AVENUE, SUITE 1350	ORLANDO, FL 32801	407-923-2000		X				
3. CLAIMS MANAGEMENT SOLUTIONS, LLC	KAREN TRECIAK	92 ENGLISH RUN CIRCLE	SPARKS, MD 21152	410-404-3127						
4. NATIONAL INSURANCE CONSULTANTS, INC	HERMAN ROSS	3430 EAST RUSSELL ROAD, SUITE 301-72	LAS VEGAS, NV 89120	702-696-9586	469-276-7712				X	
5. QUEST BENEFITS, INC. DBA QUEST INSURANCE	CHRIS CORBETT	4433 BROOKFIELD CORPORATE DRIVE, SUITE A	CHANTILLY, VA 20151	703-961-8886	703-961-8887	X				
6. WILLIS TOWERS WATSON	BOB HOWARD	12605 PARK POTOMAC AVENUE, SUITE 300	POTOMAC, MD 20854	301-692-3013		X				



Planholder List - 8-18-C002

PLANHOLDER LIST FOR SOLICITATION 8-18-C002 INSURANCE BROKER SERVICES - DULLES CORRIDOR METRORAIL PROJECT

CONTRACTOR NAME	PRIMARY CONTACT	STREET ADDRESS	CITY, STATE, ZIP	PHONE NUMBER	FAX NUMBER	HOW FIRM INTENDS TO PARTICIPATE IN SOLICITATION				
						PRIME	J.V.	SUB	SUPL.	OTHER
1. ALLIANT INSURANCE SERVICES	MARCUS BEVERLY	2180 HARVARD STREET, SUITE 460	SACRAMENTO, CA 95815	916-643-2704	916-643-2700	X				
2. CLAIMS MANAGEMENT SOLUTIONS, LLC	KAREN TRECIAK	92 ENGLISH RUN CIRCLE	SPARKS, MD 21152	410-404-3127				X		
3. WILLIS TOWERS WATSON	BOB HOWARD	12505 PARK POTOMAC AVENUE, SUITE 300	POTOMAC, MD 20854	301-892-3013		X				



Proposal Requirements

- Refer to Section X, Attachment 02, Evaluation Criteria and Proposal Submission Requirements.
- Proposals are due March 26, 2:00 PM local time at the address identified on the solicitation - Section V-11 - SUBMISSION OF OFFERS:

Hand Delivery & Private Carrier

Metropolitan Washington Airports Authority
Procurement and Contracts Department
2733 Crystal Drive Arlington, VA 22202
Attn: Scott G. Jimmo, 1-18-C087/Michael Grealy, 8-18-C002

USPS

Metropolitan Washington Airports Authority
Procurement and Contracts Department
1 Aviation Circle Washington, DC 20001-6000
Attn: Scott G. Jimmo, 1-18-C087/Michael Grealy, 8-18-C002



STEP ONE

Envelope 1 - Representations

Submit an original and one (1) copy of the following documents:

- a. Solicitation Offer and Award Page
- b. Representations and Certifications, Section IV
- c. LDBE Certification Exhibits as applicable: **(Not Required for Rail Project Proposal)**
 - Exhibit A, Voluntary Efforts to Obtain MBE/WBE Participation
 - Exhibit F, LDBE Certification Application or proof of certification
 - Exhibit G, Application for Joint Venture Eligibility
 - Exhibit H, Request for Waiver
 - Exhibit I, LDBE Unavailability Certification
- d. Insurance Affidavit (Section X – Attachment 03)
- e. Federal Requirements (Section X – Attachment 05) (Rail Proposal)



STEP ONE – Envelope 2

Technical Proposal Requirements

Submit an original and two (2) copies:

- Do not include any reference to price.
- Submit on typewritten 8 ½ x 11” plain white paper.
- Assemble in a three ring binder or staple. No other binding methods are acceptable.
- Do not exceed twenty five (25), double-spaced, single sided pages. Exhibits and samples of previous work are not included in the 25-page limit.
- **Address the evaluation criteria in the order they are presented.**



Evaluation Criteria

In STEP ONE the Airports Authority will evaluate the technical proposals based on:

Criterion 1: Minimum Qualifications of Brokerage Firm and Key Personnel

Criterion 2: Experience, Past Performance, and Staffing Plan

Please refer to Attachment 2 - EVALUATION CRITERIA AND PROPOSAL SUBMISSION REQUIREMENTS for a detailed description of the criteria.

The technical proposals will be reviewed by the Airports Authority and rated **PASS or **FAIL**.**



STEP TWO

Price Proposal

Only Offerors whose technical proposal was rated as **PASS** will be invited to submit priced bids via Amendment.

- Bids must be submitted in accordance with the price schedule.
- DBE Exhibits, if applicable, will be submitted with the bids.
- Include LDBE Exhibit D with bid for IFB 1-18-C087
- Bids shall be opened at a public bid opening.
- The total prices of each bid will be posted online for the information of bidders and other interested parties.



Contract Scope - Overview

The Metropolitan Washington Airports Authority (Airports Authority) intends to award a contract to an independent qualified risk management consultant to act as the Airports Authority's advisor, consultant, and professional insurance broker. The selected insurance broker will be the Airports Authority's Broker of Record (Contractor) to provide insurance broker services relating to the operational activities of the Airports, and the Dulles Toll Road (DTR), and the construction activities of the Airports, the DTR and the Rail Project.



Contract Scope - Overview

- Background
- Insurance Binding Authority
- The Airports Authority Risk Management Function
- Current Operational Insurance Program
- Aviation Owner Controlled Insurance Program (Aviation OCIP)
- Rail Owner Controlled Insurance Program (Rail OCIP)
- Confidentiality
- No formal coverage proposals
- Minimum Qualifications
- Scope of Work
- Broker of Record Services
- Aviation and Rail OCIP Administrative Services
- Authority Provided Resources and Equipment



LDBE Participation Requirements

IFB 1-18-C087 has a **20% Local Disadvantaged Business Enterprise (LDBE)** participation requirement. Firms located within a 100-mile radius of the Washington, DC zero mile marker and whose 3 year average annual gross receipts, including all affiliates, do not exceed the specified size standards are eligible for consideration.

LDBE and DBE Size Standards:

<u>NAICS Code Standard</u>	<u>Type of Work/Service</u>	<u>LDBE Size</u>
524210	Insurance Agencies & Brokerage	\$7.5 Million
524291	Claims Adjusting	\$20.5 Million
524292	3 rd Party Administration, Insurance	\$32.5 Million
524298	All Other Insurance Related Activities	\$15 Million
541219	Other Accounting/Auditing Services	\$20.5 Million
541611	Administrative & General Management Consulting	\$15 Million

For any LDBE/MBE/WBE or DBE information, including other LDBE or DBE size standards, contact the Supplier Diversity Department at **703-417-8660**



LDBE Certification Requirements

- Race and gender-neutral program
- Small business, organized for profit, that is not dominant in its field
- Average annual gross receipts (based on the firm's last three years), must not exceed the small business size standard.
- Must be located within a 100-mile radius of the Washington, DC's Zero Mile Marker
 - As of application date, the business has an established office where the firm's owner, management, or employees are present and conduct the firm's business on a regular and frequent basis.

LDBE certification is valid for a period of 3 years
Apply for re-certification 60 days before expiration
Be specific with your NAICS code



Exhibit D

METROPOLITAN WASHINGTON AIRPORTS AUTHORITY
CONTRACT PARTICIPATION FORM (ORIGINAL)

Solicitation Number: _____
 Date: _____
 Offeror Name: _____
 Project Name: _____

LDBE Participation Percent Requirement: _____
 Base Contract Price: _____
 Original Contracted LDBE Eligible Participation: _____
 Original Percent Contracted LDBE Eligible Participation: _____

The Offeror shall submit the Contract Participation Form to the Contracting Officer with the offer. Please insert additional rows if needed.

LIST THE PRIME AND ALL FIRST TIER FIRMS PARTICIPATING IN THIS CONTRACT Identify whether firms are "P, S, JV, SP, B, H, MFG, in next column.	TYPE OF FIRM (see below)	FEDERAL TAX ID (also known as Employer Identification Number) nine digit number.	Enter "X" for all that apply				ADDRESS (Number, Street, City, State, ZIP)	DESCRIBE TYPE OF WORK (Electrical, Paving, etc. with notation e.g. "Labor Only", "Material Only", "Complete") Item Number if Applicable, Quantity, Unit Price	AGREED PRICE**** (Base Contract Only)	LDBE ELIGIBLE PERCENTAGE	LDBE ELIGIBLE DOLLARS
			LDBE	MBE	WBE	OTHER					
EX	SAMPLE	S	55-5555555	X	X		12345 Main Street, Washington, DC 20001	Furnish and install Structural Steel	\$985,000.00		
	Prime Contractor or Joint Venture										
P	LDBE and Non-LDBE Subcontractors, Suppliers, etc.										
1											
2											
3											
4											
5											
6											
7											
8											
9											
10											
11											
12											
13											
14											
15											
16											
17											
18											
19											
20											
21											
TOTAL AGREED PRICE MUST EQUAL BASE CONTRACT PRICE AS SHOWN ON THE PRICE SCHEDULE											

I, _____ (Type or Print Name), a duly authorized representative of _____ (Type or Print Name of Firm or Prime Contractor) certify that the information furnished above is correct and to the best of my knowledge represents the current status of the Firm or Prime Contractor's subcontracts with the listed Subcontractors.

Signature: _____ Title: _____ Date: _____

* TYPE OF FIRM

- P = Prime Contractor (if LDBE, counts at 100%)
- S = Subcontractor (if LDBE, counts at 100%)
- JV = Joint Venture (if LDBE, counts at 100%)
- SP = Stocking Supplier/Distributor (if LDBE, counts at 60%, unless 100% LDBE Requirement)
- B = Broker, Agent, Packager (if LDBE, typically counts at 5%, unless 100% LDBE Requirement)
- H = Hauler (if LDBE, counts at 60%, unless 100% LDBE Requirement)
- MFG = Manufacturer (if LDBE, counts at 100%)

- ** MBE = A certified Minority Business Enterprise (Attach current certification letter, if applicable)
- *** WBE = A certified Women Business Enterprise (Attach current certification letter, if applicable)

(Information regarding MBE/WBE participation will be used for generalized statistical purposes and program analysis.)
 **** AGREED PRICE = For the purpose of this form, only include Base Contract value. Do not include Option Years or Alternates in this form.
 Post award, LDBE percentage shall be based on the current contract amount, to include any Option Years, Alternates or Modifications, as applicable.
 Agreed Price for each firm listed is the amount that they are self-performing and cannot include any work being subcontracted.



Exhibit E

METROPOLITAN WASHINGTON AIRPORTS AUTHORITY
LETTER OF INTENT

(Name of Prime Contractor) Contract Number _____
Location _____
Contract Name _____

(Name of 1st Tier Subcontractor (If Applicable))

- A. The undersigned LDBE intends to perform the work associated with this contract as (Check one):
 Individual Partnership Corporation Joint Venture
- B. The undersigned LDBE will perform the work associated with this contract as a (Check all that apply):
 Construction Contractor Stocking Supplier Manufacturer Stocking Distributor
 Broker, Agent, Packager Hauler Service Provider (for non-construction contracts)
- C. The undersigned LDBE will: Perform the following services Supply the following materials, equipment, supplies:

IF AVAILABLE, PLEASE ATTACH A COPY OF THE PROPOSED SCOPE OF WORK AND SUBCONTRACT AGREEMENT FOR THIS SUBCONTRACTOR.

Item Number	Detailed Description Of Scope of Work	Scope of Services (Check One)	Quantity	Unit Price
01	_____	<input type="checkbox"/> Labor Only <input type="checkbox"/> Matl Only <input type="checkbox"/> Complete	_____	_____
02	_____	<input type="checkbox"/> Labor Only <input type="checkbox"/> Matl Only <input type="checkbox"/> Complete	_____	_____
03	_____	<input type="checkbox"/> Labor Only <input type="checkbox"/> Matl Only <input type="checkbox"/> Complete	_____	_____
04	_____	<input type="checkbox"/> Labor Only <input type="checkbox"/> Matl Only <input type="checkbox"/> Complete	_____	_____

Please Attach Additional Sheets if Necessary

- D. Work described above will be performed at the following total price: \$ _____.
- E. Total Contract Amount: \$ _____
- F. Term of Contract Commencement Date: _____ Completion Date: _____
- G. _____% of the dollar value of the subcontract will be performed by (check if applicable):
 Non-LDBE contractors Non-LDBE suppliers.

The undersigned will enter into a subcontract consistent with the above upon execution of a contract between the Prime Contractor and the Authority: (NOTE: SIGNATURES MUST BE DATED)

(Print or Type Name of LDBE Firm) Agreed To _____
(Print or Type Name of Prime Contractor)

By _____
(Print or Type Name and Title) _____
(Print or Type Name and Title)

(Signature) _____
(Date) _____ (Signature) _____
(Date) _____

(Print or Type LDBE's Certification Expiration Date)

FOR MWA A USE ONLY

MWAA DSD Specialist's Approval \$ _____
 (Enter The Amount of Contract Approved for LDBE Participation) _____
 (Signature) _____ (Date) _____

MWAA/DSD 03/2017



Supplier Diversity Management System

- Online contract compliance monitoring
- Online certification application and renewal
- Real-time monitoring of certification applications in process
- Targeted outreach for contracting opportunities
- Contractor visibility into MWAA directory of certified firms

mwaa.diversitycompliance.com



Supplier Diversity Management System

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QUESTIONS?



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reaganairport

FlyDulles

dullestollroad

