



PRE-PROPOSAL CONFERENCE

RFP-19-10478

Western Lands Investment/Advisory Consulting
Services

February 6, 2019





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 RFP documents, the RFP documents will take precedence



Summary of Solicitation

- Procurement Method: Technically Only
- Estimate: Up to \$150,000 annually
- Performance Period: One (1) year base period
- Option Years: Four (4) one year options, at the discretion of the Airports Authority
- Anticipated Contract Award: First quarter, 2019
- Contract Type: Combined Firm Fixed/Unit-Price
- Contractors are encouraged to ask questions or get clarifications to the Terms and Conditions during the Q&A period. Any exceptions to the Terms and Conditions must be submitted on the Exceptions to this Solicitation Form (Section X – Attachment 04).



Proposal Requirements

- Proposals are due February 26, 2019 NLT 1:00 PM (EST) at the address identified on the solicitation



Metropolitan Washington Airports Authority Procurement and Contracts Dept., MA-29 2733 Crystal Drive Arlington, VA 22202		1. FOR INFORMATION CALL NAME: Katherine A. Ruhl TELEPHONE NUMBER: <i>(No Collect Calls)</i> 703-417-8666	
2. SOLICITATION NUMBER RFP-19-10478	3. TYPE OF SOLICITATION REQUEST FOR PROPOSALS (RFP)	4. DATE ISSUED January 24, 2019	

- Refer to Section X, Attachment 02, Evaluation Criteria and Proposal Submission Requirements



Proposal Submissions

Part 1 – Representation Package

Submit an original and one (1) copy of the following documents in the Representation Package envelope:

- a. Solicitation Offer and Award
- b. Representations and Certifications (Section IV)
- c. Conflict of Interest (Section VI)
- d. LDBE Certification Exhibits as applicable:
 - Exhibit A, Voluntary Efforts to Obtain MBE/WBE Participation
- e. Insurance Affidavit (Section X – Attachment 03)
- f. Completed Exceptions to this Solicitation Form (Section X – Attachment 04)



Proposal Submissions

Part 2 – Price Proposal

- Submit an original and one (1) copy of the following documents:
 - Price Schedule, Section III
 - Contract Participation Form, Exhibit D



Exhibit D

**METROPOLITAN WASHINGTON AIRPORTS AUTHORITY
CONTRACT PARTICIPATION FORM**

Check One: Original Revised Date: _____ Contract No.: _____

Name of Offeror: _____ Project Name: _____

Original Contracted LDBE Participation: \$ _____ Original Percent Contracted LDBE Participation: _____ %

The Offeror shall submit the Contract Participation Form to the Contracting Officer with the offer. Please attach additional sheets 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
				LDBE	MBE **	WBE ***	OTHER			
EX	SAMPLE	S	55-5555555	X	X			12345 Main Street, Washington, DC 20001	Furnish and install Structural Steel	\$986,000.00
1										
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
TOTAL AGREED PRICE MUST EQUAL TOTAL OFFERED PRICE:										

I, _____, a duly authorized representative of _____, certify that the above information is true and correct.
(type or print name) (name of firm)

Signature: _____ Date: _____

TYPE OF FIRM

*P = Prime Contractor
S = Subcontractor
JV = Joint Venture

SP = Stocking Supplier/Distributor
B = Broker, Agent, Packager
H = Hauler
MFG = Manufacturer

** MBE = A certified Minority Business Enterprise (Attach current certification letter)
*** WBE = A certified Women Business Enterprise (Attach current certification letter)
(Information regarding MBE/WBE participation will be used for generalized statistical purposes and program analysis.)

Rev. 07/2007



Proposal Submissions

Part 3 – Technical Proposal

- Submit an original and five (5) 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 fifteen (15), double-spaced, single sided pages. Exhibits and samples of previous work are not included in the 15-page limit
 - Address the evaluation criteria in the order they are presented



Proposal Submissions

Part 4 – Electronic USB Flash Drive Package

Submit a single USB Flash Drive containing an electronic copy of the following in the Electronic USB Flash Drive Package.

- a. PDF of Representation Package
- b. Microsoft Excel Format of Price Schedule (PDF may be included)
- c. PDF of Technical Proposal



Evaluation Criteria

Criterion 1: Experience and Qualifications of the Firm and Personnel

Criterion 2: Reporting and Analysis

Criterion 3: Past Performance



Contract Scope

Scope of Services – Consultant to provide Investment Advisor Services for the Western Lands Account. The primary role of the investment consultant is to provide objective third-party advice that will enable the Airports Authority Investment Committee to make well informed and educated decisions regarding the investments of funds in this account.

Background – The current Western Lands Account market value is approximately \$200,000,000. The currently approved asset security classes are: Stocks, U.S. Large-Cap Stocks, U.S. Small-Cap Stocks, International Stocks, Fixed Income Securities, Convertible Bonds, Real Estate and Cash and Equivalents.

Investment Consulting Services – Include Strategies of Changes or Enhancements to Investment Policy and Initial Assessment of Current Asset Allocations; Reports and Analysis; Monthly Status Reports; Investment goals, objectives and policies; recommendations and presentations/seminars.

Additional Advisory Services (Supplemental) – The Consultant may be asked to review investment policies and practices, for investments under the purview of the Investment Committee.



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 3:00 PM February 8, 2019
- Answers to all questions received will be posted on-line, and all registered Planholders will be notified



Planholders List

**PLANHOLDER LIST FOR SOLICITATION RFP-19-10478
WESTERN LANDS INVESTMENT/ADVISORY CONSULTING 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. GALLAGHER FIDUCIARY ADVISORS, LLC	JOHN MURPHY	1667 K STREET NW, SUITE 1270	WASHINGTON, DC 20006	202-898-2270		X				
2. GALLAGHER FIDUCIARY ADVISORS, LLC	MORGAN D. ANDERSON	1667 K STREET NW, SUITE 1270	WASHINGTON, DC 20006	202-898-2270		X				
3. GALLAGHER FIDUCIARY ADVISORS, LLC	PHIL FABRIZIO	1667 K STREET NW, SUITE 1270	WASHINGTON, DC 20006	202-898-2270	202-898-1819	X				
4. ICCG, INC.	HANFORD JONES	14 SOUTH BURNT MILL ROAD	VOORHESS, NJ 08043	609-864-4756	856-541-7243					X
5. INVESTMENT PERFORMANCE SERVICES, LLC	THERESA KLINE	570 EAST YORK STREET	SAVANNAH, GA 31401	912-629-4138	912-355-6866	X				
6. MARQUETTE ASSOCIATES, INC.	LEE MARTIN	180 NORTH LASALLE STREET, SUITE 3500	CHICAGO, IL 60601	312-527-5600		X				
7. MARQUETTE ASSOCIATES, INC.	PATRICK WING	180 NORTH LASALLE STREET, SUITE 3500	CHICAGO, IL 60601	312-527-5600		X				
8. MEKETA INVESTMENT GROUP	LISA RUBIN	100 LOWDER BROOK DRIVE, SUITE 1100	WESTWOOD, MA 2090	781-471-3500		X				
9. RIVER AND MERCANTILE, LLC	CONOR FORTIN	130 TURNER STREET, BUILDING 3, SUITE 510	WALTHAM, MA 2453	781-424-9269		X				
10. WEALTHCARE FINANCIAL GROUP, INC.	MARTIN A. SMITH	4800 HAMPDEN LANE, SUITE 200	BETHESDA, MD 20814	240-482-3752		X	X	X		



QUESTIONS



METROPOLITAN
WASHINGTON
AIRPORTS AUTHORITY

MWAA.COM



@Reagan_Airport

@Dulles_Airport

@Dulles_Toll_Road



reaganairport

FlyDulles

dullestollroad

