PORT AUTHORITY OF ALLEGHENY COUNTY

TRANSMITTAL MEMORANDUM #1

TO: All Holders of Request for Proposal No. 21-02

SUBJECT: Property and Casualty Risk Management Services
Request for Proposal No. 21-02

DATE: March 26, 2021

Please find enclosed the following:

RFP 21-02 Information Meeting Agenda
RFP 21-02 Information Meeting Minutes dated March 25, 2021
RFP 21-02 Information Meeting Attendance Sheet
RFP 21-02 Information Meeting Presentation Slides
RFP 21-02 Potential DBE List

The following signature acknowledges the receipt of this Transmittal Memorandum #1.

_____
Signature

_____
Name of Company

_____
Date

Sign above and return signature page only promptly upon receipt to:

Port Authority of Allegheny County
Purchasing and Materials Management Department
345 Sixth Avenue, Third Floor
Pittsburgh, PA 15222-2527

Attention: Fred Buckner

PORT AUTHORITY OF ALLEGHENY COUNTY

Information Meeting Agenda

Request for Proposal No. 21-02

Property and Casualty Risk Management Services

DATE: Thursday, March 25, 2021

TIME: 9:30 A.M.

SEQUENCE:

A. Introduction

B. Telephone Contacts for Proposer Questions

Diverse Business Enterprises' Questions:

Sue Broadus – Port Authority (412) 566-5257

Procedural Questions:

Fred Buckner – Port Authority (412) 566-5467

eBusiness Registration Questions:

Anna Marie McKibben – Port Authority (412) 566-5104

Questions Relating to Schedule of Activities and Technical Questions:

Must be in writing and must be submitted by mail, e-mail or facsimile to:

Port Authority of Allegheny County
345 Sixth Avenue, Third Floor
Pittsburgh, PA 15222-2527
Fax: (412) 566-5359
Attn: Mr. Fred Buckner
E-Mail: fbuckner@portauthority.org

C. Review RFP Document and Proposal Requirements

D. Overview of Scope of Services

E. Questions and Answers

F. Wrap-Up

PORT AUTHORITY OF ALLEGHENY COUNTY

Property and Casualty Risk Management Services
Request for Proposal No. 21-02
March 25, 2021
Information Meeting Minutes

Port Authority of Allegheny County's (Authority) Information Meeting for the above-referenced Request for Proposal (RFP) was held on March 25, 2021 at 9:30 AM. A copy of the attendance sheet is attached.

Fred Buckner, Professional Services Contract Specialist, opened the meeting for Port Authority. The other Port Authority attendees making presentations were: Anna Maria McKibben, Professional Services Contract Specialist; Susanna Broadus, DBE/DB Program Manager; and Cathy Frye, Insurance Administrator.

Ms. McKibben then provided an overview of the eBusiness procedures for registration and submitting a proposal.

- All Proposers must be registered in eBusiness at http://ebusiness.portauthority.org in order to be notified of Authority solicitations, to obtain copies of RFP's, the subsequent addenda and other related information, and to submit a Proposal in response to this RFP 21-02.

- Although RFP documents will also be available on Port Authority's website, Port Authority will only accept electronic proposal submittals through the eBusiness portal for this RFP, which requires vendor registration. Instructions to how to submit a proposal through Authority's eBusiness website can be found in Exhibit 12 of the RFP.

Mr. Buckner then discussed the following items:

- Proposers were directed to the RFP for instruction requirements. The requirements were briefly summarized for the attendees. All requirements are addressed in the RFP documents.

- Electronic Proposals must be received and timestamped by a representative of the Purchasing and Materials Management Department through Authority's eBusiness website at or before 2:00 p.m., prevailing time, April 9, 2021 at http://ebusiness.portauthority.org. Proposals received or time stamped after the advertised time for the submission of proposals shall be non-responsive and therefore ineligible for award. Each Proposer shall be solely responsible for assuring that its proposal is timely received and time stamped in accordance with the requirements herein.

- All procedural questions concerning this RFP should be directed to Fred Buckner. Questions concerning clarifications should be submitted in writing to the attention of Mr. Buckner of the Purchasing and Materials Management Department and may be faxed to (412) 566-5359 or e-mailed to fbuckner@PortAuthority.org. Port Authority will not respond to questions received, other than procedural, after March 29, 2021. Verbal questions will not be honored in any future agreement.

- Ms. Broadus addressed the DB requirements for the RFP as follows:

- Despite the fact that percentage goals are not associated with the Diverse Business Program, to the extent that subcontracting opportunities are made available, contractors are required to consider and solicit from Diverse Business firms.
- The contractor must make a good faith effort to ensure that properly certified DB's have the maximum opportunity to participate in the contract and the associated subcontracts.
- All DBs must be certified.
- Certifying agencies are:
    - PA UCP.com Port Authority administered
        - www.paucp.com
    - National Minority Supplier Diversity Council (NMSDC)
    - Women's Business Enterprise Council (WBENC)
    - Small Business Administration (SBA)
    - Department of Veteran Affairs
- The following websites were provided for DBE/DB information purposes:
    - PA UCP DBE Directory (www.paucp.com),
    - PA DGS Small Diverse Business Directory (www.dgs.internet.state.pa.us/suppliersearch)
    - PennDOT SBE Directory (www.dotsbe.pa.gov)
- Port Authority will be reviewing proposed Diverse Business Participation as part of the Selection Criteria.
- The contractor is required to report on its DB usage throughout the duration of this contract.
- There are penalties imposed for non-compliance of the DB Program.
- If assistance is required in utilizing DBE/DBs, or how to become a certified DBE/DB, Proposers should contact Ms. Sue Broadus at (412) 566-5257 or by email sbroadus@portauthority.org. *"Potential DBEs for RFP 21-02 Property and Casualty Risk Management Services",* is provided for informational purposes only. Proposers should directly vet any and all subcontractors they intend to contract with.

- All questions relating to clarifications of, or modifications to, the RFP must be in writing. If any questions submitted require the issuance of an addendum, an addendum will be issued to all RFP document holders. Proposals must be submitted based on the RFP as written, and as modified my Addenda.

- Exhibit 1 in the RFP is the Sample Agreement that Port Authority will utilize to enter into an Agreement with the successful Proposer. Please review and, per the RFP provide any comments in your proposal. The term of the Agreement will be for a three (3) year period with the option to extend the term of the Agreement up to an additional two (2) years. It was stressed that any comments/exceptions to Exhibit 1, the Sample Agreement be provided in the Appendix section of the Proposal. Post RFP comments/exceptions to the Sample Agreement that are not set forth in a firm's proposal will not be considered or subject to any further negotiation consideration by Port Authority during the post award Agreement finalization process.

- The anticipated Procurement Schedule for this RFP is as follows:

    - Proposers' last day for submitting questions is March 29, 2021.

- Proposals are due by 2:00 PM on April 9, 2021.
- Interviews are tentatively scheduled for May 11 and May 12, 2021.
- The RFP is tentatively scheduled for recommendation for approval at the July 2021 Board of Directors Meeting.
- Commencement of Services is tentatively scheduled for October 1, 2021.

Ms. Frye then provided a general overview of the scope of services that Port Authority is seeking via this RFP. Section 4.0 of the RFP on pages 25 through 27 of the RFP documents contains that scope of services

Following the overview, the floor was opened for general discussion and any questions from the attendees. The questions will be answered as a part of this Transmittal. Any additional questions received before the March 29, 2021 deadline for the submission of questions will be answered in the next Transmittal.

The meeting was adjourned at 10:08 AM.

QUESTION 1:
Does the RFP cover any construction projects, OCIPs, or other construction related placements?

RESPONSE 1:
It could. None scheduled at this time. The last time there was an OCIP it was for the North Shore Connector. That was a large construction project but there is also run of the mill construction that happens regularly.

QUESTION 2:
Can you provide the budget allocated for this RFP?

RESPONSE 2:
The Authority is unable to disclose this information. Proposers should provide their costs in accordance with the response to the RFP requirements.

Fred Buckner
Professional Services Associate Contract Specialist

Attachments: *Attendance Sheet, RFP21-02 Information Meeting Presentation, "Potential DBEs for RFP 21-02 Property and Casualty Risk Management Services"* ***(posted on ebusiness as a separate file),***
cc: Project File

PORT AUTHORITY OF ALLEGHENY COUNTY

INFORMATION MEETING ATTENDANCE

SUBJECT: Property and Casualty Risk Management Services
Request for Proposal No. 21-02
DATE: March 25, 2021
TIME: 9:30 AM

Representative Name	Company	Mailing Address	Phone No.	E-Mail Address	Check Here if Port Authority/ PA UCP Certified DBE / DB
Anna Marie McKibben	PAAC			amckibben@portauthority.org	
Cathy Frye	PAAC			cfrye@portauthority.org	
Sarah Scharding	PAAC			sscharding@portauthority.org	
Robert Monks	PAAC			rmonks@portauthority.org	
Todd Stoker	PAAC			tstoker#@portauthority.org	
Fred Buckner	PAAC			fbuckner@portauthority.org	
Sarah Kastelic	PAAC			skastelic@portauthority.org	
Susanna Broadus	PAAC			SBroadus@PortAuthority.org	
Fonda Duse	PAAC			jward@portauthority.org	
Mike Schuler	Willis Towers Watson				
Justin Johnson	Aon				
Jim Cottone	Alliant Insurance				

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Informational Meeting
Request for Proposals No. 21-02
March 25, 2021

INTRODUCTIONS

- **Fred Buckner**
  - Professional Services Contract Specialist
  - Will provide a general overview of the RFP requirements
- **Cathy Frye**
  - Insurance Administrator
  - Will provide an overview of scope of services
- **Anna Marie McKibben**
  - Professional Services Contract Specialist
  - Will provide an overview eBusiness registration/submission
- **Sue Broadus**
  - DBE / DB Program Manager
  - Will address the DB/DBE requirements

Virtual and Phone Etiquette

- Please make sure your virtual microphones and phones are on mute throughout the duration of the meeting.

- If you're joining through Teams virtual platform, all questions should be entered in the Chat Box.

- If joining by phone, you need to announce yourself and the company you represent before asking your question.

- **ALL** questions must also be submitted in writing to:
  fbuckner@portauthority.org

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eBusiness Overview

Ebusiness Registration

- You **must** be registered:
  - To receive notifications for this RFP
  - To submit a proposal for this RFP
- Registration estimated time is 5-10 minutes to complete
- Recommend registered when there is time to complete



Already Registered?

- Great! Please check your credentials!
- Don’t remember you User ID or Password?
- Getting an error message?

Contact **Anna Marie McKibben** at:

amckibben@portauthority.org

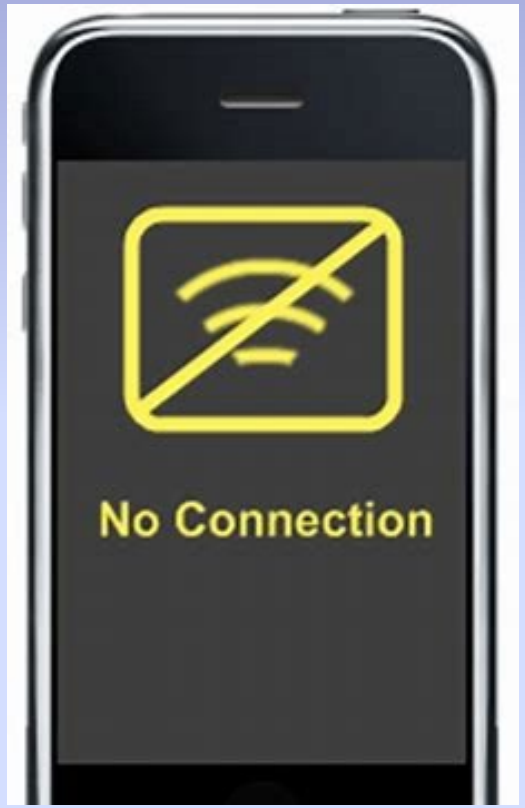
DO NOT WAIT!!!!!



- Navigating eBusiness takes time
- Uploading documents takes time
- Submitting the proposal takes time
- You may get an error message
- The system will kick you out when the event closes
- **PLEASE ALLOW YOURSELF ENOUGH TIME**

Web Browser Compatibility

- Recommended Browsers:
  - Chrome
  - FireFox
  - Edge
  - Safari
- Not mobile friendly

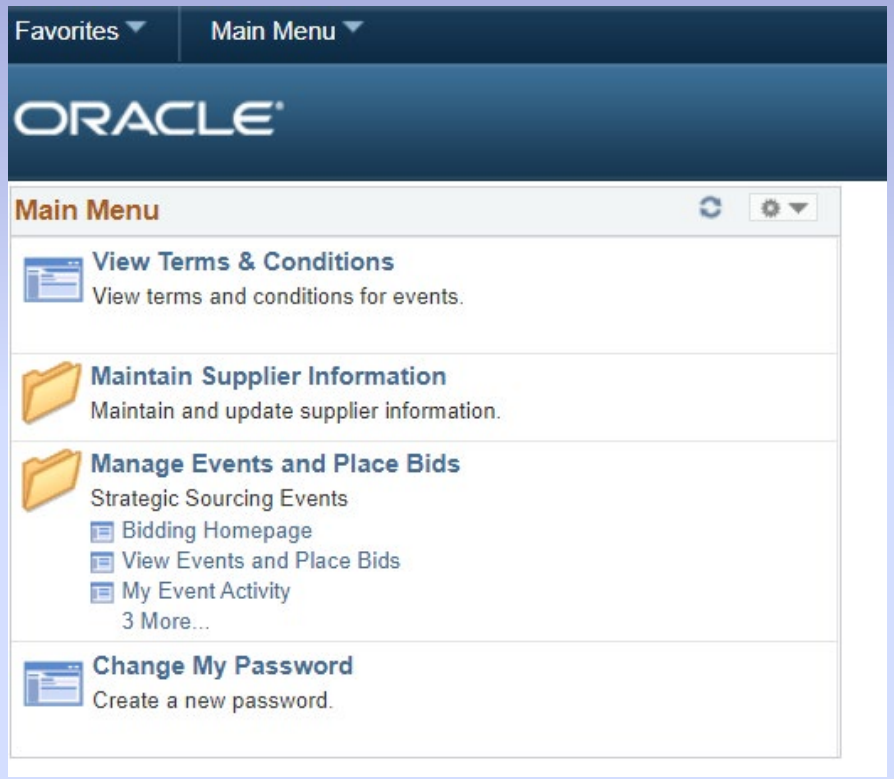


eBusiness Portal Overview



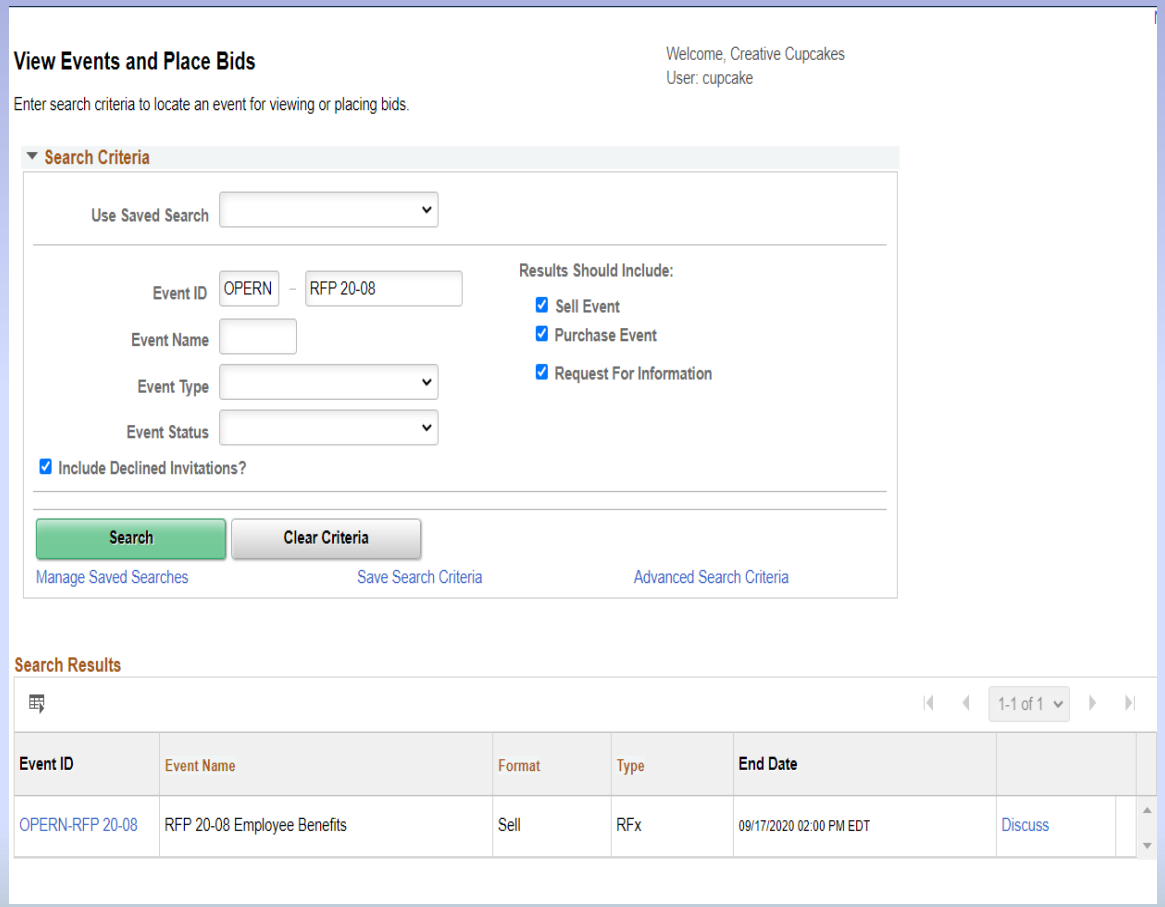
- Login
- Download User Guide
- Register
- Reset Password

eBusiness Portal Overview



- View Events and Place Bids

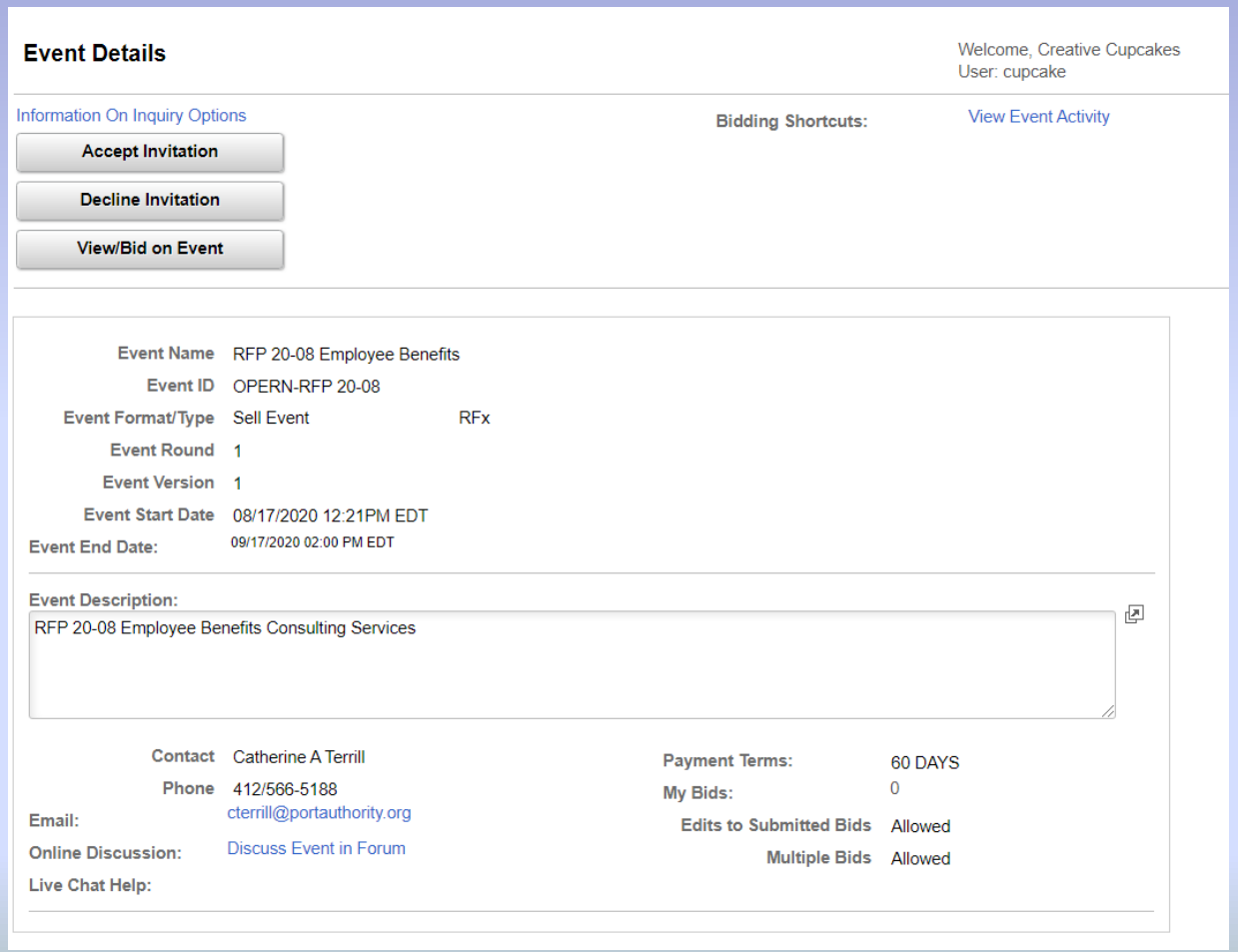
eBusiness Portal Overview



This page takes time to load!

- Displays all Sourcing Events
- Enter Event ID
- Search
- Click Event ID

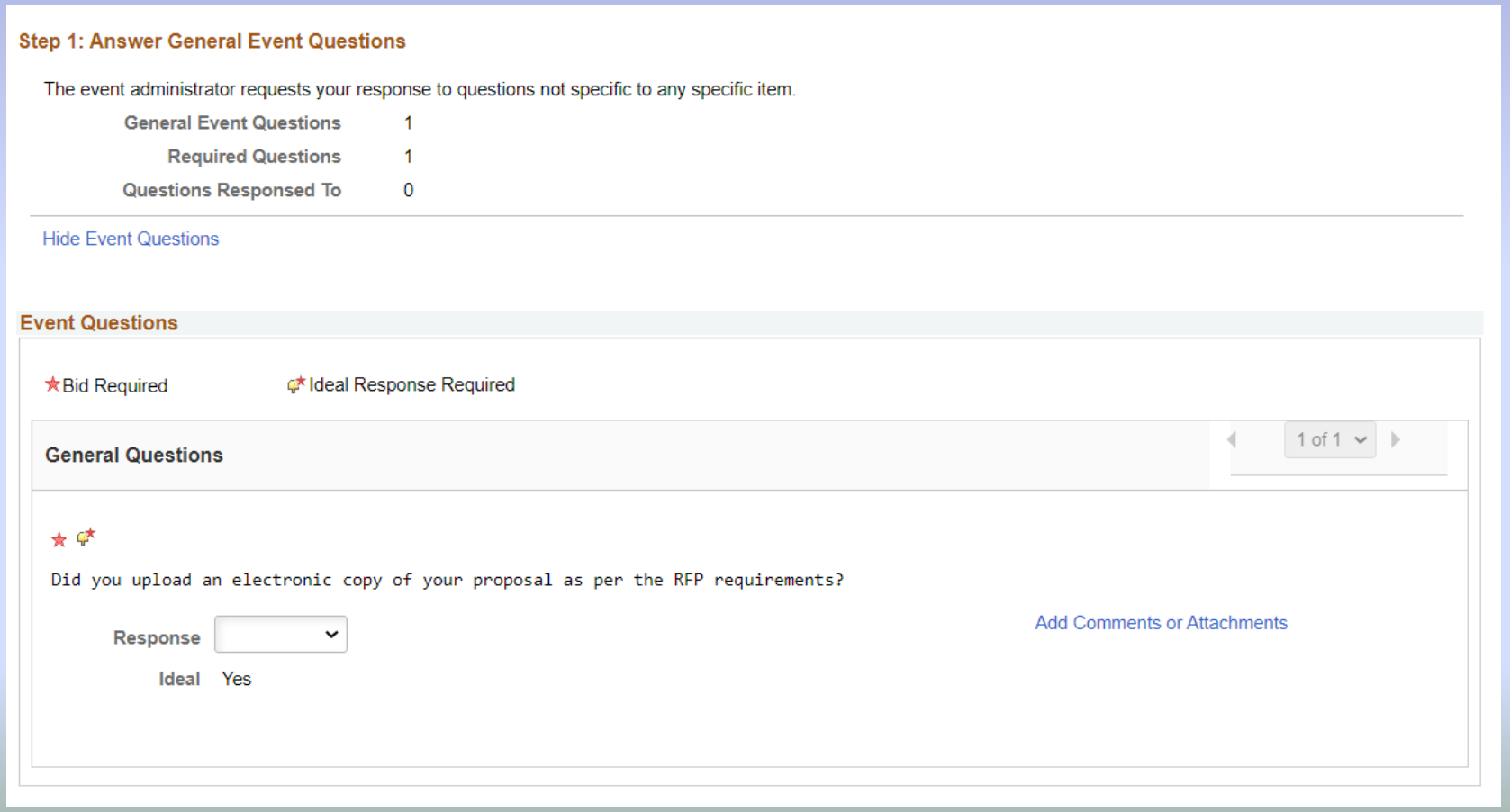
eBusiness Portal Overview



- Contact Info
- Discuss Event in Forum is disabled
- Please contact the Contract Specialist directly
- Click View/Bid on Event

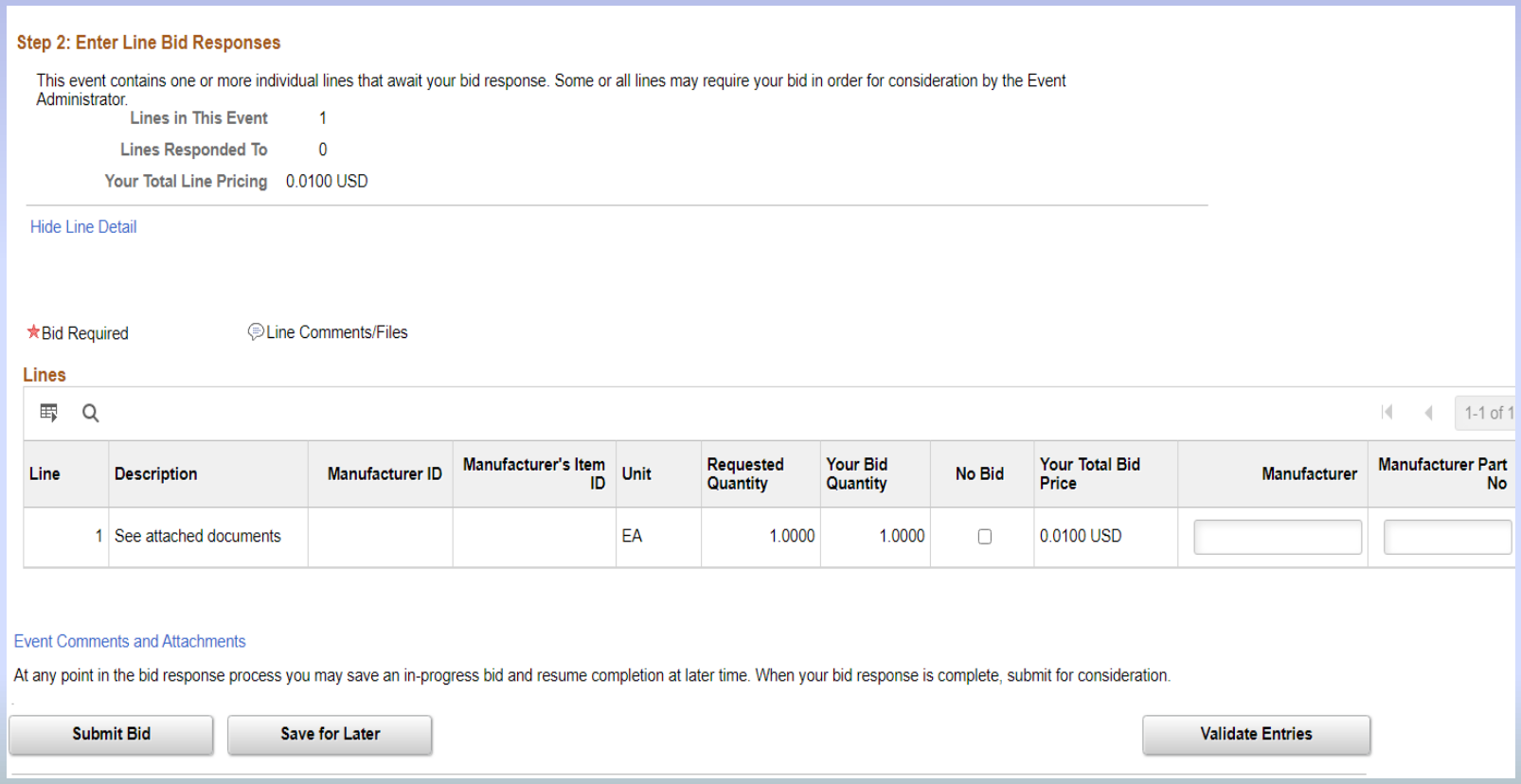
eBusiness Portal Overview

- Answer General Event Questions
- Provides Ideal Answer



eBusiness Portal Overview

- Leave Line Item information blank
- Event Comments and Attachments



Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event	1
Lines Responded To	0
Your Total Line Pricing	0.0100 USD

Hide Line Detail

★Bid Required Line Comments/Files

Lines

1-1 of 1

Line	Description	Manufacturer ID	Manufacturer's Item ID	Unit	Requested Quantity	Your Bid Quantity	No Bid	Your Total Bid Price	Manufacturer	Manufacturer Part No
1	See attached documents			EA	1.0000	1.0000	☐	0.0100 USD		

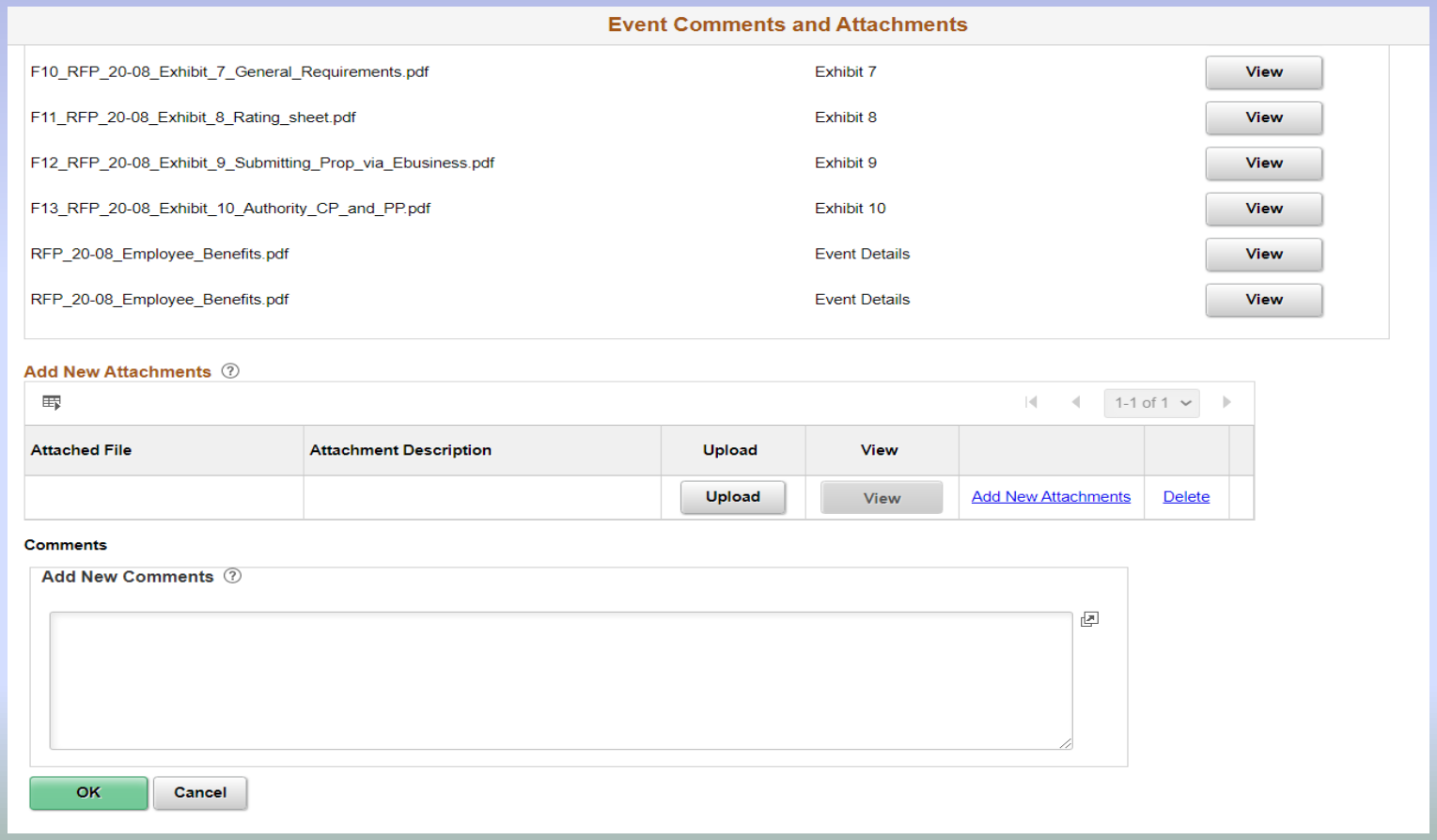
Event Comments and Attachments

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

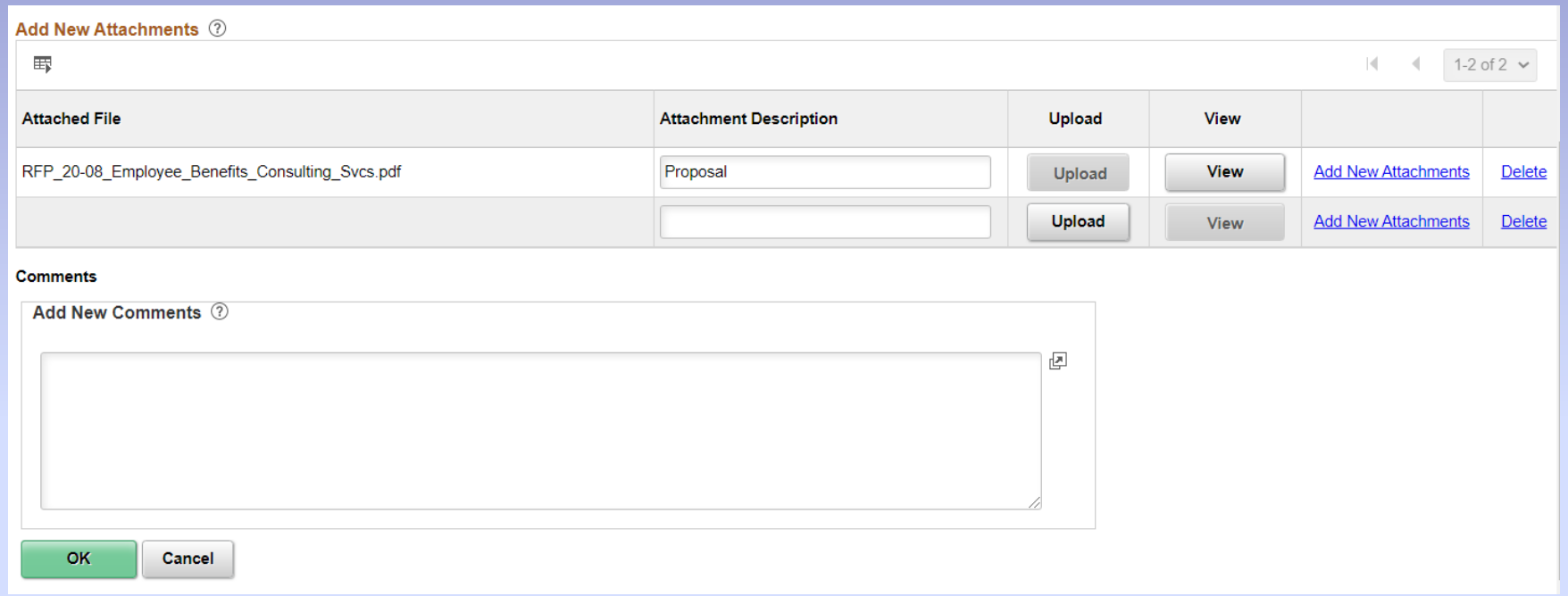
Submit Bid Save for Later Validate Entries

eBusiness Portal Overview

- Download RFP Documents
- Upload Proposal



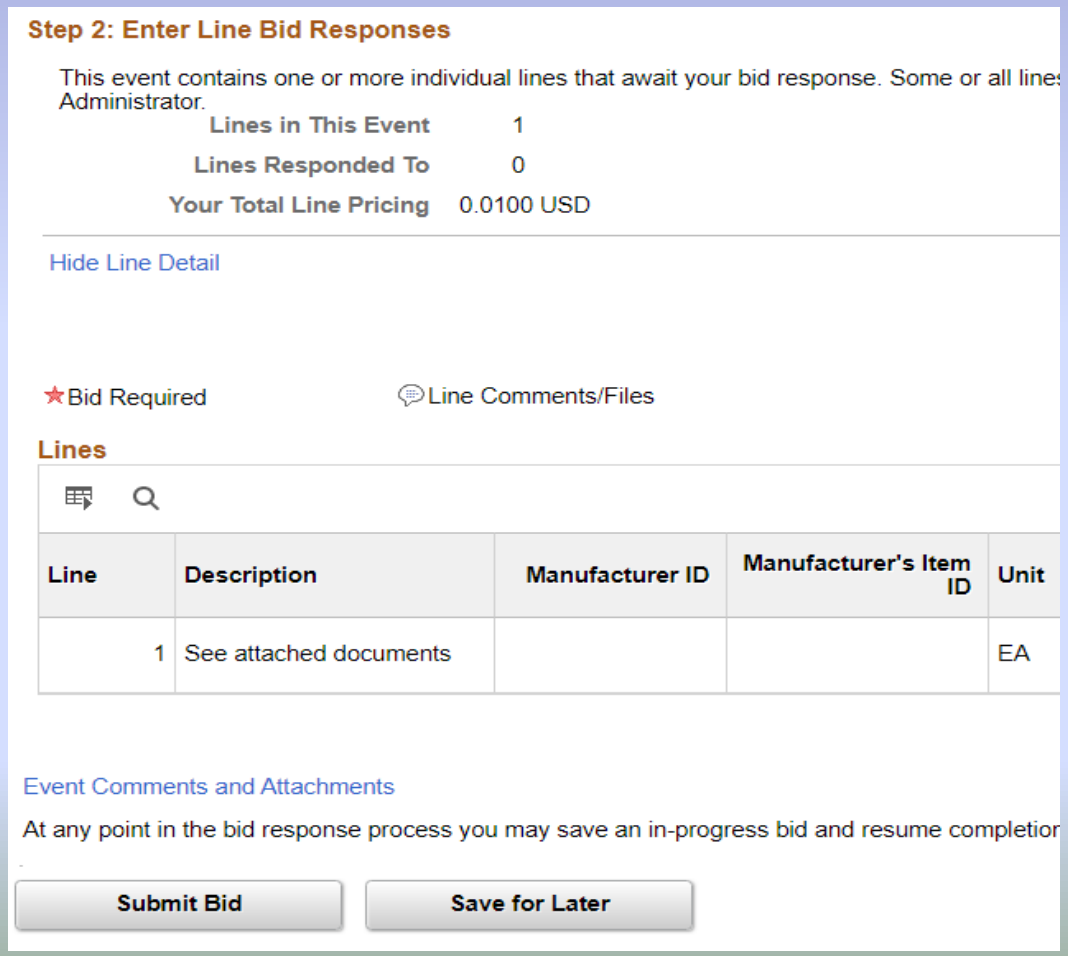
eBusiness Portal Overview



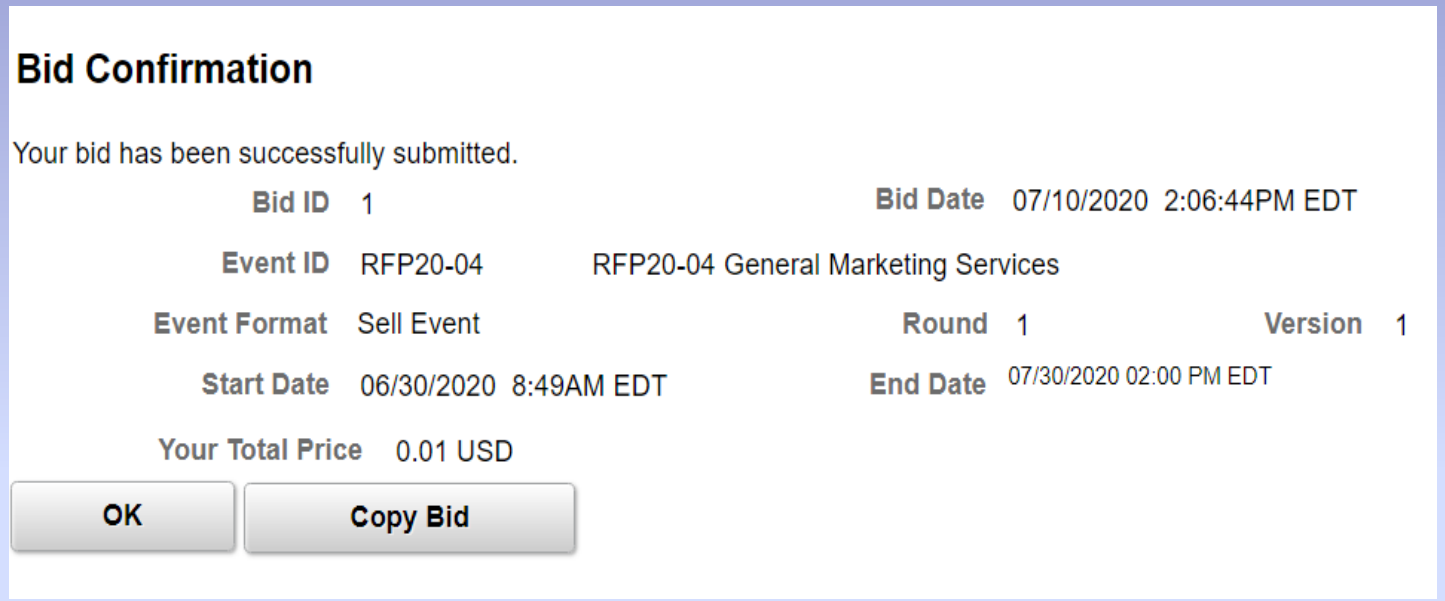
- Enter Attachment Description
- Click Add New Attachment for each additional document
- Click Ok

eBusiness Portal Overview

Save for Later vs. Submit Bid



eBusiness Portal Overview



- Click OK
- Done!
- You will receive an email confirmation that the proposal was submitted

Additional eBusiness Information

- Carefully select categories related to your type of business
- STRONGLY encourage to register multiple personnel
- Be proactive in updating eBusiness registration information
- Be proactive in checking Authority's website



eBusiness Support

Please contact the following for eBusiness questions:

Anna Marie McKibben at
AMcKibben@PortAuthority.org



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General Overview of RFP Requirements

General Information

- **Authority is requesting proposals for:**
  - Property and Casualty Risk Management Services including, but not limited to:
    - The design and marketing of operational insurance coverages, evaluation of insurance proposals, placement of insurance coverages, and advising on insurance requirements for Authority and Authority's contractors and vendors.
    - The services will support the Authority's ongoing risk management activities continuously throughout the term of the Agreement
- **Term of the Agreement**
  - All services will be performed on an as needed, project specific, work order basis
  - Agreement will last for a three (3) year period with the option to extend up to an additional two (2) years.

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General Information

- **Proposals must be submitted electronically through Authority's eBusiness system**
  - By 2:00p.m., prevailing time, April 9, 2021
  - Instructions have been provided in Exhibit 12 of the RFP
- **The cut off date for Technical Questions is March 29, 2021**
  - Please contact, Fred Buckner
  - Clarification and modifications to the RFP
    - **MUST BE IN WRITING**
    - Email fbuckner@portauthority.org or Fax (412) 566-5359
- **Tentative Presentation for Board Approval**
  - July 2021

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SECTION 2.0 – PROPOSAL REQUIREMENTS

- **Structure of Proposal**
  - Cover
  - Letter of Transmittal (Include items identified in Section 2.1.1)
  - Section 1 – Overview of Proposal
  - Section 2 – Experience Record
  - Section 3 – Project Work Plan
  - Section 4 – Project Organization and Management Plan
  - Section 5 – Summary of Costs
  - Appendix Information
- **Shall be no more than 50 pages**
  - Appendix information is in addition to page limit
  - Font Size for all material shall not be less than 10 pt.

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Section 2.1.2
DB/DBE Subcontractor Participation

- Inclusion of DB/DBE participation will be accounted for in the proposal evaluation process.
- Despite the fact that percentage goals are not associated with the Diverse Business Program, to the extent that subcontracting opportunities are made available, Contractors are required to consider and solicit from Diverse Business firms.
- Proposers shall make a "good faith" effort to ensure maximum DB opportunities to participate.
- Certified DBEs can be found on the PAUCP website
  - www.paucp.com
- If assistance is required in obtaining DB/DBEs:

  Sue Broadus
  Phone: (412) 566-5257
  Email: Sbroadus@PortAuthority.org

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SECTION 2.2
OVERVIEW OF PROPOSER

SECTION 1 OF THE PROPOSAL

- **Include a description of the Proposer and its subcontractors**

- **Contractor will be required to perform a minimum of 90% of the work**
  - A maximum of 10% may be subcontracted
  - Include percentage of work to be performed by the Proposer and its proposed Subcontractors

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SECTION 2.3
EXPERIENCE RECORD

SECTION 2 OF THE PROPOSAL

- Please include three (3) references of relevant work performed by Proposer (and its subcontractors), directly applicable to the contract services
- Status (ongoing or completed) and Time Frame
- Responsibilities for the Project
- Project Manager and Staff (and subcontractors) for each identified project
- Contract Value
- Client Contact

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SECTION 2.4
PROJECT WORK PLAN
SECTION 3 OF THE PROPOSAL

- **Demonstrate understanding and approach**
  - **DO NOT REINTERATE THE RFP SCOPE OF SERVICES**

- **Identify each task and names of individuals or disciplines**
  - Include Subcontractors

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Section 2.5
Project Organization and Mgt. Plan
Section 4 of the Proposal

- **Description, roles, and responsibilities for Contract Services**
  - Project Manager
  - Key Personnel
  - Subcontractors
- **Provide Organizational Chart**
  - Include individual's name
  - Include company
  - Include proposed role

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SECTION 2.6
SUMMARY OF COSTS
SECTION 5 OF THE PROPOSAL

- **Sample form provided in Exhibit 6**
  - Alternate fee structure may be proposed

- **A separate Summary of Costs form is required for each subcontractor**

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SECTION 2.7
APPENDIX INFORMATION
APPENDIX SECTION OF THE PROPOSAL

- **Financial Information**
  - Two (2) most recently completed financial years
  - Publicly held firms shall include in the Proposal
  - Privately held firm may defer until notice of being short-listed
- **Certifications**
  - Exhibit 2 [Certification of Debarment]
  - Exhibit 3 [Certification of Lobbying and Disclosure Form]
  - Prime Contractor submission only. Subcontractors prior to award of Agreement.
- **Resumes**
  - Exhibit 5
  - Not to exceed 20 pages

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SECTION 2.7
APPENDIX INFORMATION
APPENDIX SECTION OF THE PROPOSAL

- **Key Personnel Letter(s)**
  - Signed letter by Proposer and any of its proposed subcontractors
- **Affirmative Action and Equal Opportunity Policy Statement**
  - Signed and dated
  - **DO NOT SUBMIT ACTUAL POLICY**
- **Insurance Coverage Statement**
  - Requirements in Exhibit 1 [Sample Agreement]
  - **DO NOT SUBMIT CERTIFICATE OF INSURANCE AT THIS TIME**
- **Exhibit 1 [Sample Agreement No. R21-02]**
  - Deviations must be set forth in Proposal to receive consideration

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SECTION 3.0
PROPOSAL SELECTION PROCESS
EXHIBIT 8 – EVALUATION RATING CRITERIA

RFP Reference Section	Rating Criteria	Weighted Multiplier	Preliminary		Final	
			Rating Score	Weighted Score	Rating Score	Weighted Score
2.1.2	DBE/DB Utilization	2				
2.3	Experience Record	8				
2.4	Project Work Plan	8				
2.5	Project Organization and Management Plan	9				
2.5.2	Project Manager	9				
2.5.2	Staff Resumes	6				
2.6	Summary of Costs	5				
	TOTAL WEIGHTED SCORE:	**47**				

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Section 4
Scope of Services

Overview of the Scope of Services

Presented by Cathy Frye

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Scope Related Questions and Answers Session

ALL QUESTIONS MUST BE SUBMITTED IN WRITING VIA E-MAIL TO:

fbuckner@portauthority.org



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TENTATIVE DATES

- **Last day for questions** — **March 29, 2021**
- **Proposal due by 2:00pm** — **April 9, 2021**
- **Interviews (tentative)** — **May 11-12, 2021**
- **Presentation for Board Consideration (tentative)** — **July 2021**
- **Commencement of Services** — **October 1, 2021**

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