



# Department of Health

## Request for Proposals

**RFP # 20253**

### Actuarial Services

**Issued: 7/15/2024**

#### **DESIGNATED CONTACT:**

Pursuant to State Finance Law §§ 139-j and 139-k, the New York State Department of Health (hereinafter referred to as the “**Department**” or as “**DOH**”) identifies the following designated person to whom all communications attempting to influence the Department’s conduct or decision regarding this procurement must be made.

Sue Mantica  
Bureau of Contracts  
New York State Department of Health  
Corning Tower, Room 2827  
Governor Nelson A. Rockefeller Empire State Plaza  
Albany, New York 12237  
Telephone: 518-474-7896  
Email Address: [sue.mantica@health.ny.gov](mailto:sue.mantica@health.ny.gov)

#### **PERMISSIBLE SUBJECT MATTER CONTACT:**

Pursuant to State Finance Law § 139-j(3)(a), the Department identifies the following allowable person to contact for communications related to the submission of written bids, written questions, pre-bid questions, and debriefings.

Timothy Moore  
New York State Department of Health  
NY State of Health  
Corning Tower, Room 2580  
Governor Nelson A. Rockefeller Empire State Plaza  
Albany, New York 12237  
Telephone: 518-474-1727  
Email Address: [NYSOHcontracts@health.ny.gov](mailto:NYSOHcontracts@health.ny.gov)

## **TABLE OF CONTENTS**

1.0	CALENDAR OF EVENTS.....	3
2.0	OVERVIEW .....	3
2.1	Introductory Background .....	3
2.2	Important Information.....	4
2.3	Term of the Agreement .....	5
3.0	BIDDERS' QUALIFICATIONS TO PROPOSE .....	5
3.1	Minimum Qualifications.....	5
3.2	Preferred Qualifications.....	5
4.0	SCOPE OF WORK .....	5
4.1	Tasks/Deliverables.....	6
4.2	Studies .....	6
4.3	Other Deliverables .....	7
4.4	Task Order Request Process .....	8
4.5	Staffing.....	8
4.6	Reporting.....	9
4.7	Information Technology.....	10
4.8	Security .....	10
4.9	Transition.....	10
4.10	Payment.....	11
4.11	Subcontracting.....	12
4.12	Contract Insurance Requirements .....	12
4.13	Minority & Women-Owned Business Enterprise (M/WBE) Requirements .....	13
4.14	Participation Opportunities for NYS Certified Service-Disabled Veteran-Owned Businesses .....	14
5.0	ADMINISTRATIVE INFORMATION.....	14
5.1	Restricted Period .....	14
5.2	Questions .....	15
5.3	Right to Modify RFP.....	15
5.4	DOH's Reserved Rights .....	15
5.5	Debriefing .....	16
5.6	Protest Procedures .....	16
5.7	Freedom of Information Law ("FOIL") .....	16
5.8	Piggybacking .....	16
5.9	Intellectual Property .....	17
6.0	PROPOSAL CONTENT .....	17
6.1	Administrative Proposal .....	17
6.2	Technical Proposal .....	19
6.3	Cost Proposal.....	23
7.0	PROPOSAL SUBMISSION .....	23
7.1	No Bid Form .....	24
8.0	METHOD OF AWARD .....	24
8.1	General Information .....	24
8.2	Submission Review.....	25
8.3	Technical Evaluation.....	25
8.4	Cost Evaluation.....	25
8.5	Composite Score .....	26
8.6	Award Recommendation .....	26
9.0	ATTACHMENTS.....	26

## 1.0 CALENDAR OF EVENTS

<b>RFP 20253– ACTUARIAL SERVICES</b>	
<b><u>EVENT</u></b>	<b><u>DATE</u></b>
Issuance of Request for Proposals	07/15/2024
Deadline for Submission of Written Questions	Questions Due By 08/2/2024 at <b>5:00 p.m. ET</b>
Responses to Written Questions Posted by DOH	Responses Posted <b>On or About</b> 08/19/2024
Deadline for Submission of Proposals	Proposals Due On Or Before 09/11/2024 at <b>4:00 p.m. ET</b>
<i>Anticipated</i> Contract Start Date	04/01/2025

## 2.0 OVERVIEW

Through this Request for Proposals (“RFP”), the New York State (“NYS”) Department of Health (the “DOH”) is seeking competitive proposals from qualified bidders to assist the State with the conduct of one or more studies to inform policy decisions related to the implementation of the NY State of Health. and to provide the actuarial services as further detailed in Section 4.0 (Scope of Work). It is the Department’s intent to award one (1) contract from this procurement.

### 2.1 Introductory Background

Millions of New Yorkers have embraced the health care expansion provided by the Affordable Care Act (ACA). New York State has codified critical consumer protections from the Affordable Care Act into State law; including preexisting conditions, prohibition on annual and lifetime dollar limits, the guarantee of quality Essential Health Benefits and the ability to keep children on their parent’s plans through age 26. New York also implemented a Basic Health Program (known as the “Essential Plan”) in 2015, and has secured approval of a Section 1332 State Innovation Waiver from the Centers for Medicare and Medicaid Services (CMS), changing the authority of the Essential Plan to Section 1332 of the Affordable Care Act, and expanding Essential Plan eligibility.

New York State of Health (NYSOH), the official health plan marketplace (Marketplace), authorized by the federal Patient Protection and Affordable Care Act of 2010 (ACA), was established in April 2012 by Governor Cuomo’s Executive Order Number 42. NYSOH was codified in the NY Public Health Law in 2019. The NYSOH Marketplace has successfully increased the affordability and accessibility of health insurance coverage in New York. NYSOH has successfully increased the affordability and accessibility of health insurance coverage in New York. As of January 31, 2024, more than 6.7 million individuals—or one in three New Yorkers—are enrolled in health coverage through the Marketplace. This increase in coverage has resulted in a historic decline in uninsured rates from 10 to just below 5 percent between 2013 and 2022.

In 2016, New York launched the Essential Plan under the Affordable Care Act’s Basic Health Program option. The Essential Plan makes comprehensive coverage even more affordable for lower-income New Yorkers. As of January 31, 2024, over 288,000 people are enrolled in a Qualified Health Plan and nearly 2 million are enrolled in the Essential Plan. (Additional details can be found here: <https://info.nystateofhealth.ny.gov/enrollmentdata>.)

Applicants can enroll in coverage through the NYSOH on-line, by telephone or with the help of a certified in-person assister. NYSOH also makes available to consumers an easy-to-use plan preview, or anonymous shopping tool, which allows individuals to shop for a health plan and get a personalized premium estimate before starting an application.

On October 1, 2012, NYS formally submitted its selection of an Essential Health Benefits (EHB) benchmark plan to the United States Department of Health and Human Services (HHS). New York selected the benefits of the State's largest small group plan, Oxford Exclusive Provider Organization (EPO), as the benchmark plan. In addition to the selection of a benchmark plan, the state indicated the coverage areas in which benefits will be supplemented in order to meet ACA requirements, as follows:

- Pediatric Dental/Vision Coverage – New York State prefers to supplement the benchmark selection with the current pediatric dental/vision benefits that are offered as part of the state's Children's Health Insurance Program (CHIP) coverage.
- Habilitative Services – New York State prefers that coverage parameters for habilitative services be offered on parity with rehabilitative services.
- Mental Health/Substance Abuse Parity - Any existing limits on these benefits must be removed as mental health parity is included as part of the EHB definition.
- Removal of Annual/Lifetime Dollar Limits - New York State awaits further federal guidance on the process for substituting dollar limits on benefits with actuarially equivalent quantitative limits (e.g., annual visit limits).

While the ACA affords great flexibility for states to make adjustments to Marketplace policy and operations, it is apparent that each decision will have far reaching consequences, impacting both the residents of New York and the success of the Marketplace.

## 2.2 Important Information

The Bidder **must** review, and is requested to have its legal counsel review, [Attachment 8](#), the DOH Agreement (Standard Contract), as the successful Bidder must be willing to enter into the Contract awarded pursuant to this RFP in the terms of [Attachment 8](#), **subject only to any amendments to the Standard Contract agreed by DOH during the Question and Answer Phase of this RFP** (see, [Section 5.2](#)). Please note that this RFP and the awarded Bidder's Bid will become part of the Contract as Appendix B and C, respectively.

It should be noted that Appendix A of [Attachment 8](#), "Standard Clauses for New York State Contracts", contains important information, terms and conditions related to the Contract to be entered into as a result of this RFP and **will be incorporated, without change or amendment**, into the Contract entered into between DOH and the successful Bidder. By submitting a response to this RFP, the Bidder agrees to comply with all the provisions of the Contract, including all of the provisions of Appendix A.

Note, [Attachment 7](#), the Bidder's Certified Statements, **must** be submitted by each Bidder and includes a statement that the Bidder accepts, **without any added conditions, qualifications or exceptions**, the contract terms and conditions contained in this RFP including any exhibits and attachments, including, without limitation, [Attachment 8](#). It also includes a statement that the Bidder acknowledges that, should any alternative proposals or extraneous terms be submitted with its Bid, such alternate proposals or extraneous terms will not be evaluated by the DOH.

Any qualifications or exceptions proposed by a Bidder to this RFP should be submitted in writing using the process set forth in [Section 5.2](#) (Questions) prior to the deadline for submission of written questions indicated in [Section 1](#). (Calendar of Events). Any such qualifications or exceptions that are not proposed prior to the deadline for the submission of written questions will not be considered by DOH after contract award. Any

amendments DOH makes to the RFP as a result of questions and answers will be publicized on the DOH web site and will be available and applicable to all Bidders equally.

### **2.3 Term of the Agreement**

The term of the Contract that will be entered into pursuant to this RFP between the DOH and the successful Bidder is expected to be for a period of five (5) years with a possible one (1) year extension commencing on the date shown on the Calendar of Events in [Section 1](#), subject to the availability of sufficient funding, successful Contractor performance, and approvals from the New York State Attorney General (AG) and the Office of the State Comptroller (OSC).

## **3.0 BIDDERS' QUALIFICATIONS TO PROPOSE**

### **3.1 Minimum Qualifications**

The NYSDOH will accept proposals from Bidders with the following types and levels of experience as a prime contractor.

- At least three (3) years of health care insurance industry actuarial experience;
- Employ an actuary who will be assigned to the contract that is a member of at least one of the following:
  - American Academy of Actuaries,
  - Fellow or Associate of the Society of Actuaries or the Casualty Actuarial Society,
  - Fellow of the Conference of Consulting Actuaries,
  - Member or a Fellow of the American Society of Pension Professional and Actuaries,  
OR
  - Member of another International Actuarial Association member organization.

Note: Documentation of these credentials must be submitted with the Bidder's proposal;

For the purposes of this RFP, a "prime contractor" is defined as one who has the contract with the owner of a project or job and has full responsibility for its completion. A prime contractor undertakes to perform a complete contract and may employ (and manage) one or more subcontractors to carry out specific parts of the contract.

Failure to meet these Minimum Qualifications will result in a proposal being found non-responsive and eliminated from consideration.

### **3.2 Preferred Qualifications**

The NYSDOH will give preference to Bidders that poses at least five (5) years of health care insurance industry actuarial experience.

## **4.0 SCOPE OF WORK**

This Section describes the actuarial services that are required to be provided by the selected bidder. The selected bidder must be able to provide all of these services throughout the contract term.

**PLEASE NOTE:** Bidders will be requested to provide responses that address all of the requirements of this RFP as part of its Technical Proposal.

The terms "bidders", "vendors" and "proposers" are also used interchangeably. For purposes of this RFP, the use of the terms "shall", "must" and "will" are used interchangeably when describing the Contractor's/Bidder's duties.

## 4.1 Tasks/Deliverables

The DOH is in need of actuarial services to assist in the conduct of the studies described below. The Contractor must provide the following services to DOH through its own resources, at the specific request of DOH. The services to be performed under the scope of this contract will be intermittent. It is estimated that the Contractor will incur about 2,400 hours of consultant work per contract year. Completion of individual task orders will be required within the timeframes prescribed in the task order request.

## 4.2 Studies

### Study #1 Essential Health Benefits for NY State of Health

The Contractor may be asked, via Task Order (see Section 4.4 for Task Order Process), to conduct a study exploring options regarding the benefits currently offered by NYSOH and the feasibility of making changes to that benefit package in the future. In making its findings and recommendations, the Contractor shall also consider the individual and small group markets outside of the Exchange, approaches to prevent marketplace disruption and avoid adverse selection, and the goal of maximizing consistency inside and outside of the Exchange:

- Prepare an actuarial analysis looking comprehensively at potential changes in benefits of the current EHB Benchmark plan, affirming the scope of benefits is at least that of a typical employer plan and does not exceed the generosity of the designated comparison plans.
- Prepare documentation reflecting the benefits and limitations, including a drug formulary list, and any other documentation as required by HHS to operationalize the New York State EHB Benchmark Plan.
- Prepare a final report and certification to meet the requirements of the relevant task order.
- Prepare and present the findings to designated staff/contacts.

### Study #2: Standard Plan Development and Insurer Participation

The Contractor may be asked via Task Order (see Section 4.4 for Task Order Process), to research and make recommendations on impact of changing the standard plan. In making its findings and recommendations, the Contractor shall also consider the impact of such changes on insurer participation, consumer choice, and the ability of the Exchange to influence the quality and delivery of health care services. Requested analyses may include, but are not limited to, the following scenarios:

- Impact of plans covering services before deductible is met (“first dollar coverage”) at all metal-levels.
- Impact of reducing/limiting number of standard plan options available to consumers to reduce confusion and optimize appropriate choice of health plan.
- Impact of changing copayments for prescription drugs at various levels (generic, preferred, non-preferred).
- Impact of adding additional benefits, e.g. transgender care coverage;
- Recommend plan design changes that address health equity. In conjunction with health experts, identify specific conditions that standard plans should cover in order to increase equity. For example, Diabetes management.
- Research the impact on standard plan design actuarial value if a set number of perinatal care visits were covered before deductible was met.
- Recommend plan design changes to Stand Alone Dental Plans.

### Study #3 – Section 1332 State Innovation Waiver Analysis

Through Section 1332 of the Affordable Care Act (ACA), states may apply for waivers to alter key ACA requirements in the individual and small group insurance markets. The ACA requirements that States may seek to waive using Section 1332 authority include:

- Essential health benefits (EHBs);
- Limits on cost sharing for covered benefits;
- Metal tiers of coverage;
- Standards for health insurance marketplaces, including requirements to establish a website, a call center, and a navigator program; and
- Premium tax credits and cost-sharing reductions.

Once a Task Order is issued (see Section 4.4 for Task Order Process), the Contractor shall research and perform any actuarial work related to the application, update, and implementation of Section 1332 State Innovation Waivers granted to NYS by the federal government.

The Contractor will also assist the DOH by conducting and compiling data analyses necessary to meet the Section 1332 annual reporting requirements, per New York's Section 1332 Waiver Specific Terms and Conditions. The Contractor will collect and analyze data from multiple sources, including individual market carriers, and others as needed to meet the reporting requirements. The Contractor will provide such support, including, but not limited to:

- Supplying rate data,
- Premium rate reduction methodology,
- Actuarial assumptions,
- Market impact analysis,
- draft responses to CMS inquiries,
- provide a clear and actuarially justified methodology for determining the impact of waiver proposal, and
- Other information, as required.

#### **4.3 Other Deliverables**

##### **4.3.1 Additional Policy Analysis**

For the duration of the contract, DOH may require the Contractor to perform additional policy not listed above. These studies, if performed under the scope of this contract will be intermittent, the completion of which, will be required within the timeframes prescribed in a task order request. DOH will initiate the Task Order Request utilizing the process detailed below in Section 4.4.

##### **4.3.2 Modeling Impact of Federal and State Policy Changes on New York**

The Contractor will use data provided by the DOH and other relevant administrative and survey data at its disposal to model using analytical tools and evaluate the impact of proposed and/or enacted federal and state policy changes (including changes in law, rules and guidance), on benefits and utilization of health insurance coverage. Contractor services include but are not limited to estimating from a health insurance utilization and cost perspective the impacts of:

- Changes to covered services and cost sharing;
- Requirements for employers to offer coverage to their employees; and
- Other regulatory and legislative federal and state policy changes that impact health insurance coverage in the state.

##### **4.3.3 Member-Level Health Plan Selection, Competition, and Stability in New York's Health Insurance Market**

Using enrollment data from the DOH, the Contractor will be required to provide DOH with analyses on the individual and small business market enrollment. With State-specific data on premiums, enrollee characteristics, and plan options, the contractor will:

- Estimate the impact on health insurance premiums paid by individuals and small businesses who purchase through the Marketplace and in the outside insurance market; and
- Examine member-level health plan selection, competition, and stability in New York’s health insurance market.

#### **4.3.4 Dental Benefits**

The Contractor will use data provided by DOH and other relevant administrative and survey data, and qualitative information to evaluate cost, enrollment and insurer participation impacts of standardizing Stand-Alone Dental Plan (SADP) options or making establishing other dental benefits and coverage standards on the NY State of Health Marketplace. The analysis should include an estimate of the impact on SADP premiums and/or overall health insurance premiums paid by individuals, and the overall impact on the stability of New York’s health insurance market.

#### **4.4 Task Order Request Process**

Request Process- For the duration of the contract, DOH will require the Contractor to provide services stated in sections 4.2-4.3. The specific tasks to be performed under the scope of this contract will be intermittent and the completion of these tasks will be required within the timeframes prescribed in the task order request. DOH will initiate the Task Order Request utilizing the process detailed below:

- DOH will submit the task order request via email to the Contractor. The Task Order Request will include the specific deliverables required and may include the timeframe in which it will be completed.
- Contractor must draft a Statement of Work (SOW) plan to complete the deliverables requested in the task order within the timeframes specified.
  - The SOW must include the job titles with the corresponding estimated number of hours per title to complete the deliverable(s) and a timeline to complete the deliverables.
- Contractor must submit the SOW to DOH within the timeframe stated by DOH in the Task Order Request.
- Upon receipt of the SOW, DOH will review the SOW and negotiate any changes deemed necessary prior to DOH final approval.
- Contractor shall not commence any work until the Task Order Request with corresponding SOW is approved by DOH.

#### **4.5 Staffing**

The bidder should provide a staffing plan for completion of services that includes the following for each:

1. Dedicate a core team consisting of approximately 10-15 staff including individuals with the appropriate experience and credentials, who will be working directly with DOH staff on a consistent basis. With:
  - a. At least one (1) member being a certified actuary; and
  - b. Two (2) project coordinators who possess the appropriate knowledge and skills to assist DOH with the tasks outlined in this RFP. Skills include but not limited to strong management skills necessary to coordinate activities, analyze data, prepare rate packages and reports, and respond to DOH’s management information needs. One (1) project coordinator will be dedicated to all rate setting and related tasks and one project coordinator will be dedicated to service based payment rate related tasks. These project coordinators should be the sole liaisons between DOH and the Contractor. DOH should be able to direct all questions, and other correspondence to these individuals.
2. The Contractor shall provide additional staff who possess strong attributes to the appropriate tasks outlined in this RFP. Specifically, the Contractor should provide staff with:
  - a. Extensive experience related to various healthcare risk adjustment methodologies, models and risk adjustment software on this team;



- b. Experience and knowledge related to risk mitigation strategies;
  - c. Extensive knowledge of federal and State public healthcare programs and policy which include but are not limited to proficiency in the programmatic aspects of federal waivers;
  - d. Experience in pharmacy utilization trends, new drug therapies and strategies on pharmacy benefit management;
  - e. Extensive knowledge and background of CMS laws and regulations;
  - f. Actuarial backgrounds and certifications;
  - g. Experience with data analytics, including experience with large datasets, and encounter data
  - h. Familiarity with implementing and maintaining efficiency and quality-based payment methodologies
3. The Contractor shall provide sufficient additional management and administrative support staff necessary to organize, prepare and carry out all administrative tasks associated with conducting the above-described tasks and submitting resultant reports.
  4. The Contractor shall maintain the staffing levels and personnel as provided in the Contractor's proposal, except as approved by DOH or caused by resignations or other situations which, in DOH's judgment, are beyond the Contractor's control. If a member of a team needs to be replaced, such replacements shall be evaluated by DOH and acceptance is subject to DOH approval. Upon DOH request, the Contractor must replace any assigned Contractor staff with an alternative staff member. If such instances arise, the Contractor must provide DOH with three (3) resumes of potential replacements within one (1) week of DOH's request.
  5. The Contractor should anticipate that its billable hours for Task Order specific work under the contract period, shall be divided among the three Staff Levels. See Attachment B: Cost Proposal for details on specific staffing levels.

## **4.6 Reporting**

### **4.6.1 Weekly Status Reports**

Weekly Status reporting ensures that NYSoH and the Contractor have a common understanding of project and the project's progress. It must identify any roadblocks to success and enables these to be circumvented before they negatively impact the project. The weekly status report must be submitted to the Department within two (2) business days from the close of the preceding week.

Weekly Status reporting includes contractor submission of the following:

- Title
- Detailed timeline showing each step in the study process and dates for key deliverables.

### **4.6.2 Monthly Progress Reports**

The Contractor must submit a monthly progress report before or with the submission of any invoices. The monthly progress report must be submitted to the DOH within ten (10) business days from the close of the preceding month.

The Monthly progress reports shall consist of:

- Activity conducted in the invoice month;
- Summary and highlight of significant progress areas;
- Summary of accomplishments in each activity area where work was performed;
- Listing of all developed materials for each activity;
- An hourly count of all meetings attended by type of activity;
- Breakdown of hours by Contractor staff Title for each activity; and
- Summary of overall updates and changes to each activity.

#### **4.6.3 Other Reporting Requirements**

Upon request from DOH, and no less than once per month, the Contractor shall provide DOH with a report identifying all staff currently providing services under the contract, which includes the following components:

- Name and title of each staff member currently providing services;
- General service area and main tasks provided of each staff member;
- Identification of any new staff member added to the contract;
- Identification of any staff member rolled off the contract including reasons for the departure; and
- Work site location of staff.

#### **4.7 Information Technology**

The application and all systems and components supporting it, including, but not limited to, any forms and databases that include Personal Health, Personal Identification or other New York State information, must comply with all NYS security policies and standards listed at <http://its.ny.gov/tables/technologypolicyindex.htm>.

#### **4.8 Security**

The selected Contractor shall comply with all privacy and security policies and procedures of the DOH (<https://its.ny.gov/policies>) and applicable State and Federal law and administrative guidance with respect to the performance of the Contract. The Contractor is required, if applicable, to execute a number of security and privacy agreements with the DOH including a Business Associate Agreement (Appendix H) and a Data Use Agreement (DUA) at contract signing.

The Contractor is expected to provide secure and confidential backup, storage and transmission for hard copy and electronically stored information. Under no circumstances will any records be released to any person, agency, or organization without specific written permission of the DOH. The Contractor is obligated to ensure any Subcontractor hired by Contractor who stores, processes, analyzes or transmits MCD on behalf of Contractor has the appropriate security requirements in place. Contractor is required to include in all subcontracts and Business Associate Agreements with their Subcontractors language surrounding the security and privacy requirements as well as the language contained in the Confidentiality Language for Third Parties section of the DUA. If any breach or suspected breach of the data or confidentiality occurs, whether the breach occurred with the Contractor or Subcontractor, DOH must be notified immediately.

The Contractor is required to maintain and provide to the DOH upon request their data confidentiality plans and procedures for meeting security requirements as they relate to the deliverables and services within this RFP, including all plans as they relate to subcontractor work where applicable.

Contractor will develop and maintain adequate fully trained staff to respond to all stakeholder inquiries while protecting confidentiality and maintaining the security and integrity of all systems. Staff must be trained to understand and observe requirements related to confidentiality and operating guidelines for functions included in this RFP.

The Contractor will comply fully with all current and future updates of the security procedures of the DOH as well as with all applicable State and Federal requirements, in performance of the Contract.

#### **4.9 Transition**

The Contractor is required to develop a plan to securely and smoothly transfer any records referenced in this section to the DOH or another DOH agent should that be required during or upon expiration of its Contract. The plan and documentation must be submitted to the DOH no later than twelve months before the last day of its Contract with the Department of Health or upon request of the DOH.

The Contractor shall provide technical and business process support as necessary and required by the Department to transition and assume contract requirements to the DOH or another DOH agent should that be required during or at the end of the Contract.

#### 4.10 Payment

Payment of invoices and/or vouchers submitted by the successful Bidder pursuant to the terms of the Contract entered into pursuant to this RFP by the DOH shall be made in accordance with Article XI-A of the New York State Finance Law. Payment terms will be:

The Contractor shall submit invoices and/or vouchers to the State's designated payment office:

Preferred Method: Email a .pdf copy of your signed voucher to the BSC at: [accountspayable@ogs.ny.gov](mailto:accountspayable@ogs.ny.gov) with a subject field as follows:

Subject: <<Unit ID: 3450475>> <<Contract #TBD>>

Alternate Method: Mail vouchers to BSC at the following U.S. postal address:

NYS Department of Health  
Unit ID 3450475  
c/o NYS OGS BSC Accounts Payable  
Building 5, 5<sup>th</sup> Floor  
1220 Washington Avenue  
Albany, NY 12226-1900

Payment for invoices and/or vouchers submitted by the Contractor shall only be rendered electronically unless payment by paper check is expressly authorized by the Commissioner, in the Commissioner's sole discretion, due to extenuating circumstances. Such electronic payment shall be made in accordance with ordinary State procedures and practices. The Contractor shall comply with the State Comptroller's procedures to authorize electronic payments. Authorization forms are available at the State Comptroller's website at <https://www.osc.state.ny.us/state-vendors> by email at [epayments@osc.state.ny.us](mailto:epayments@osc.state.ny.us) or by telephone at 518-474-6019. Contractor acknowledges that it will not receive payment on any invoices and/or vouchers submitted under this Contract if it does not comply with the State Comptroller's electronic payment procedures, except where the Commissioner has expressly authorized payment by paper check as set forth above.

In addition to the Electronic Payment Authorization Form, a Substitute Form W-9 must be on file with the Office of the State Comptroller, Bureau of Accounting Operations. Additional information and procedures for enrollment can be found at <https://www.osc.state.ny.us/state-vendors>.

Completed W-9 forms should be submitted to the following address:

NYS Office of the State Comptroller  
Bureau of Accounting Operations  
Warrant & Payment Control Unit  
110 State Street, 9<sup>th</sup> Floor  
Albany, NY 12236

Payment of such invoices and/or vouchers by the State (NYS Department of Health) shall be made in accordance with Article XI-A of the New York State Finance Law. Payment terms will be:

Payment will be made to the Contractor upon successful completion and acceptance by DOH of all deliverables in the task order as described in Section 4.0 Scope of Work (SOW). Payment will be for the actual number of hours worked, not to exceed the amount agreed upon in the Task Order Request's SOW, as approved by DOH. For payment, the Contractor must submit the Monthly Progress Report, approved Task Order Request, the approved SOW, and an invoice listing the task order number, a listing by job title of the actual number of hours worked for each staff and their applicable contracted hourly rate as pursuant to those listed in Attachment B.

## **4.11 Subcontracting**

Bidders may propose the use of a subcontractor. The Contractor shall obtain prior written approval from NYSDOH before entering into an agreement for services to be provided by a subcontractor. The Contractor is solely responsible for assuring that all the requirements of this RFP is met. All subcontracts shall contain provisions specifying that the work performed by the subcontractor must be in accordance with the terms of the prime contract, and that the subcontractor specifically agrees to be bound by the confidentiality provisions set forth in the agreement between the DOH and the Contractor. DOH reserves the right to request removal of any Bidder's staff or subcontractor's staff if, in DOH's discretion, such staff is not performing in accordance with the Contract.

NOTE: Subcontractors whose contracts are valued at or above \$100,000 will be required to submit the Vendor Responsibility Questionnaire upon selection of the prime Contractor.

## **4.12 Contract Insurance Requirements**

Prior to the start of work under the Contract, the Contractor shall procure, at its sole cost and expense, and shall maintain in force at all times during the term of the Contract, insurance of the types and in the amounts set forth in [Attachment 8](#), the New York State Department of Health Contract, Section IV. Contract Insurance Requirements as well as below.

### **4.12.1 Professional Liability**

The Contractor must procure and maintain for the duration of the contract insurance against claims for damages to Department property which may arise from or in connection with the performance of the work carried out by the Contractor, or its subcontractors.

The Contractor must maintain said insurance at the limit of \$1,000,000 per occurrence or claim, \$2,000,000 aggregate

### **4.12.2 Data Breach and Privacy/Cyber Liability including Technology Errors and Omissions**

The Contractor and any subcontractor retained by the Contractor must carry and maintain applicable coverage during and for a period of two (2) years after termination of this contract, Data Breach and Privacy/Cyber Liability Insurance, including coverage for failure to protect confidential information and failure of the security of the Contractor's computer systems or the Department's Authorized Users' systems due to the actions of the Contractor which results in the unauthorized access to the Department's data.

The Contractor must maintain said insurance at the limit of \$5,000,000 to provide coverage for damages arising from, but not limited to the following:

- Breach of duty to protect the security and confidentiality of nonpublic proprietary information;
- Personally identifiable nonpublic information (e.g., medical, financial, or personal in nature in electronic or non-electronic form);
- Privacy notification costs;
- Regulatory defense and penalties;
- Website media liability; and
- Cyber theft of the Department's property, including but not limited to money and securities.

If the policy is written on a claim made basis, the Contractor must submit to the Department an Endorsement providing proof that the policy provides for the purchase an Extended Reporting Period ("tail coverage") to provide coverage for no less than three (3) year after termination of the contract.

#### 4.13 Minority & Women-Owned Business Enterprise (M/WBE) Requirements

Pursuant to New York State Executive Law Article 15-A, the Department recognizes its obligation to promote opportunities for maximum feasible participation of **certified** minority-and woman-owned business enterprises and the employment of minority group members and women in the performance of DOH contracts.

##### Business Participation Opportunities for M/WBEs

For purposes of this RFP, DOH hereby establishes an overall goal of 30% for M/WBE participation, 15% for Minority-Owned Business Enterprises (“MBEs”) participation and 15% for Women-Owned Business Enterprises (“WBEs”), based on the current availability of qualified MBEs and WBEs and outreach efforts to certified M/WBE firms. The successful Bidder who becomes the Contractor under the Contract entered into with the Department pursuant to this RFP must document good faith efforts to provide meaningful participation by M/WBEs as subcontractors or suppliers in the performance of the Contract consistent with the M/WBE participation goals established for this procurement, and Contractor must agree that DOH may withhold payment pending receipt of the required M/WBE documentation. For guidance on how DOH will determine “good faith efforts,” refer to 5 NYCRR §142.8.

The directory of New York State Certified M/WBEs can be viewed at: <https://ny.newnycontracts.com>. The directory is found in the upper right-hand side of the webpage under “Search for Certified Firms” and accessed by clicking on the link entitled “MWBE Directory”. Engaging with firms found in the directory with like product(s) and/or service(s) is strongly encouraged, and all communication efforts and responses should be well documented to establish Contractor’s “good faith efforts”.

By submitting a Bid in response to this RFP, a Bidder agrees to complete an M/WBE Utilization Plan ([Attachment 5](#), Form #1) for this RFP. DOH will review the submitted M/WBE Utilization Plan. If the Plan is not accepted, DOH may issue a notice of deficiency. If a notice of deficiency is issued, Bidder agrees that it shall respond to the notice of deficiency within seven (7) business days after Bidder’s receipt of such notice. DOH may disqualify a Bidder as being non-responsive to this RFP under the following circumstances:

- a) If a Bidder fails to submit a M/WBE Utilization Plan;
- b) If a Bidder fails to submit a written remedy to a notice of deficiency;
- c) If a Bidder fails to submit a request for waiver (if applicable); or
- d) If DOH determines that the Bidder has failed to document good-faith efforts to provide meaningful participation by M/WBEs under the Contract in accordance with the goals for this RFP established by the Department;

The Contractor will be required to attempt to utilize, in good faith, any MBE or WBE identified in its M/WBE Utilization Plan, during the performance of the Contract. Requests for a partial or total waiver of established goal requirements made subsequent to Contract Award may be made at any time during the term of the Contract to DOH but must be made no later than prior to the submission of a request for final payment on the Contract.

The Contractor will be required to submit a Contractor’s Quarterly M/WBE Contractor Compliance & Payment Report to the DOH, by the 10<sup>th</sup> day following each end of quarter over the term of the Contract documenting the progress made toward achievement of the M/WBE goals of the Contract.

If (a) the DOH determines that the Contractor is not in compliance with the M/WBE requirements of the Contract and the Contractor refuses to comply with such requirements, or (b) the DOH finds that the Contractor has willfully and intentionally failed to comply with the M/WBE participation goals established in the Contract, the Contractor may be required to pay to the DOH liquidated damages.

Such liquidated damages shall be calculated as an amount equaling the difference between: (1) all sums identified for payment to M/WBEs had the Contractor achieved the contractual M/WBE goals; and (2) all sums actually paid to M/WBEs for work performed or materials supplied under the Contract.

A New York State certified Minority- and Women-Owned Businesses (M/WBE) may request that their firm's contact information be included on a list of M/WBE firms interested in serving as a subcontractor for this procurement. The listing will be publicly posted on the **DOH's** website for reference by the bidding community. A firm requesting inclusion on this list should send contact information and a copy of its NYS M/WBE certification to [NYSOHcontracts@health.ny.gov](mailto:NYSOHcontracts@health.ny.gov) before the Deadline for Questions as specified in [Section 1.](#) (Calendar of Events). Nothing prohibits an M/WBE Vendor from proposing as a prime Contractor.

**Please Note: Failure to comply with the foregoing requirements may result in a finding of non-responsiveness, non-responsibility and/or a breach of the Contract, leading to the withholding of funds, suspension or termination of the Contract or such other actions or enforcement proceedings as allowed by the Contract.**

#### **4.14 Participation Opportunities for NYS Certified Service-Disabled Veteran-Owned Businesses**

Article 17-B of the New York State Executive Law provides for more meaningful participation in public procurement by NYS-certified Service-Disabled Veteran-Owned Businesses ("SDVOBs"), thereby further integrating such businesses into New York State's economy. DOH recognizes the need to promote the employment of service-disabled veterans and to ensure that certified service-disabled veteran-owned businesses have opportunities for maximum feasible participation in the performance of DOH contracts.

In recognition of the service and sacrifices made by service-disabled veterans and in recognition of their economic activity in doing business in New York State, Bidders/Contractors are strongly encouraged and expected to consider SDVOBs in the fulfillment of the requirements of the Contract. Such participation may be as subcontractors or suppliers, as protégés, or in other partnering or supporting roles.

For purposes of this procurement, DOH conducted a comprehensive search and determined that the Contract does not offer sufficient opportunities to set specific goals for participation by SDVOBs as subcontractors, service providers, and suppliers to Contractor. Nevertheless, Bidder/Contractor is encouraged to make good faith efforts to promote and assist in the participation of SDVOBs on the Contract for the provision of services and materials. The directory of New York State Certified SDVOBs can be viewed at:

<https://ogs.ny.gov/veterans/>

Bidders are encouraged to contact the Office of General Services' Division of Service-Disabled Veteran's Business Development at 518-474-2015 or [VeteransDevelopment@ogs.ny.gov](mailto:VeteransDevelopment@ogs.ny.gov) to discuss methods of maximizing participation by SDVOBs on the Contract.

## **5.0 ADMINISTRATIVE INFORMATION**

The following administrative information will apply to this RFP. Failure to comply fully with this information may result in disqualification of your proposal.

### **5.1 Restricted Period**

"Restricted period" means the period of time commencing with the earliest written notice, advertisement, or solicitation of a Request for Proposals ("RFP"), Invitation for Bids ("RFP"), or solicitation of proposals, or any other method for soliciting a response from bidders intending to result in a procurement contract with DOH and ending with the final contract award and approval by DOH and, where applicable, final contract approval by the Office of the State Comptroller.

Pursuant to State Finance Law §§ 139-j and 139-k, the Department of Health identifies designated contacts on face page of this RFP to whom all communications attempting to influence this procurement must be made.

This prohibition applies to any oral, written, or electronic communication under circumstances where a reasonable person would infer that the communication was intended to influence this procurement. Violation of



any of the requirements described in this Section may be grounds for a determination that the bidder is non-responsible and therefore ineligible for this contract award. Two (2) violations within four (4) years of the rules against impermissible contacts during the “restricted period” may result in the violator being debarred from participating in DOH procurements for a period of four (4) years.

## **5.2 Questions**

Potential Bidders may submit written questions and requests for clarification pertaining to this RFP between the issuance of this RFP and the deadline for the submission of written questions specified in [Section 1](#) (Calendar of Events). All questions and requests for clarification of this RFP should cite the relevant RFP, including the RFP number and title 20253 Actuarial Services, the section and paragraph number of this RFP or of the Attachment to this RFP to which the question relates, where applicable, and must be submitted via email to [NYSOHcontracts@health.ny.gov](mailto:NYSOHcontracts@health.ny.gov) no later than the Deadline for Submission of Written Questions specified in [Section 1](#). (Calendar of Events). Questions received after the deadline **may not** be answered.

If a potential Bidder discovers any ambiguity, conflict, discrepancy, omission, or other apparent error in this RFP, the Bidder shall immediately notify DOH of such error in writing at [NYSOHcontracts@health.ny.gov](mailto:NYSOHcontracts@health.ny.gov) and request that DOH clarify or modify the Terms of this RFP. If, prior to the deadline for the Submission of Bids, a Bidder fails to notify DOH of a known error or an error that reasonably should have been known, the Bidder shall assume the risk of bidding notwithstanding such apparent ambiguity, conflict, discrepancy, omission or other error. If awarded the Contract pursuant to the terms of this RFP, the Bidder shall not be entitled to an amendment to the terms of the Contract to correct or clarify any such ambiguity, conflict, discrepancy, omission or other error nor to any additional compensation by reason of the error or its correction.

## **5.3 Right to Modify RFP**

DOH reserves the right to modify any part of this RFP, including but not limited to, the date and time by which proposals must be submitted and received by DOH, at any time prior to the Deadline for Submission of Proposals specified in [Section 1.0](#) (Calendar of Events). Modifications to this RFP shall be made by issuance of amendments and/or addenda.

Prior to the Deadline for Submission of Proposals, any such clarifications or modifications as deemed necessary by DOH will be posted to the DOH website.

If a prospective bidder discovers any ambiguity, conflict, discrepancy, omission, or other error in this RFP, the bidder shall immediately notify DOH of such error in writing at [NYSOHcontracts@health.ny.gov](mailto:NYSOHcontracts@health.ny.gov) and request clarification or modification of the RFP.

If, prior to the Deadline for Submission of Proposals, a bidder fails to notify DOH of a known error or an error that reasonably should have been known, the bidder shall assume the risk of proposing. If awarded the Contract, the bidder shall not be entitled to additional compensation by reason of the error or its correction.

## **5.4 DOH’s Reserved Rights**

The Department of Health reserves the right to:

1. Reject any or all proposals received in response to the RFP;
2. Withdraw the RFP at any time, at the Department’s sole discretion;
3. Make an award under the RFP in whole or in part;
4. Disqualify any bidder whose conduct and/or proposal fails to conform to the requirements of the RFP;
5. Seek clarifications and revisions of proposals;
6. Use proposal information obtained through site visits, management interviews and the State’s investigation of a bidder’s qualifications, experience, ability or financial standing, and any material or information submitted by the bidder in response to the Department’s request for clarifying information in the course of evaluation and/or selection under the RFP;
7. Prior to the bid opening, amend the RFP specifications to correct errors or oversights, or to supply additional information, as it becomes available;

8. Prior to the bid opening, direct bidders to submit proposal modifications addressing subsequent RFP amendments;
9. Change any of the scheduled dates;
10. Eliminate any mandatory, non-material specifications that cannot be complied with by all of the prospective bidders;
11. Waive any requirements that are not material;
12. Negotiate with the successful bidder within the scope of the RFP in the best interests of the State;
13. Conduct contract negotiations with the next responsible bidder, should the Department be unsuccessful in negotiating with the selected bidder;
14. Utilize any and all ideas submitted in the proposals received;
15. Every offer shall be firm and not revocable for a period of three hundred and sixty-five days from the bid opening, to the extent not inconsistent with section 2-205 of the uniform commercial code. Subsequent to such three hundred and sixty- five days, any bid is subject to withdrawal communicated in a writing signed by the bidder; and,
16. Require clarification at any time during the procurement process and/or require correction of arithmetic or other apparent errors for the purpose of assuring a full and complete understanding of a bidder's proposal and/or to determine a bidder's compliance with the requirements of the solicitation.

## 5.5 Debriefing

Once an award has been made, a Bidder may request a debriefing of their Bid. The debriefing will be limited solely to the Bidder's own Bid and will not include any discussion of other bids. A Bidder's request for a debriefing must be received by the Department no later than fifteen (15) calendar days after the date of the award notification to the successful Bidder or non-award announcement to the unsuccessful Bidder, depending upon whether the Bidder requesting the debriefing is the successful Bidder or an unsuccessful Bidder.

## 5.6 Protest Procedures

In the event an unsuccessful Bidder wishes to protest the award resulting from this RFP, the protesting Bidder must follow the protest procedures established by the Office of the State Comptroller (OSC). These procedures can be found in Chapter XI Section 17 of the OSC's Guide to Financial Operations, which is available on-line at: <http://www.osc.state.ny.us/agencies/guide/MyWebHelp/>

## 5.7 Freedom of Information Law ("FOIL")

All Bids may be disclosed or used by the DOH to the extent permitted by law. The DOH may disclose a Bid to any person for the purpose of assisting in evaluating the Bid or for any other lawful purpose. All Bids will become State agency records, which will be available to the public in accordance with the New York State Freedom of Information Law. **Any portion of the Bid that a Bidder believes constitutes proprietary information entitled to confidential handling, as an exception to the Freedom of Information Law, must be clearly and specifically designated in the Bid as specified in Section 6.1.2. of this RFP.** If the Department agrees with the proprietary claim, the designated portion of the Bidder's Bid will be withheld from public disclosure. Blanket assertions of proprietary material will not be accepted, and failure to specifically designate proprietary material may be deemed a waiver of any right to confidential handling of such material.

## 5.8 Piggybacking

New York State Finance Law section 163(10)(e) (see also <https://ogs.ny.gov/procurement/piggybacking-using-other-existing-contracts-0>) allows the Commissioner of the NYS Office of General Services to consent to the use of the Contract entered into pursuant to this RFP by other New York State Agencies, and other authorized purchasers, subject to conditions and the Contractor's consent.



## **5.9 Intellectual Property**

Any work product created pursuant to this RFP and the Contract awarded hereunder and any subcontract shall become the sole and exclusive property of the New York State Department of Health, which shall have all rights of ownership and authorship in such work product.

## **6.0 PROPOSAL CONTENT**

The following includes the format and information to be provided by each Bidder. Bidders responding to this RFP must satisfy all requirements stated in this RFP. All Bidders are requested to submit complete Administrative and Technical Proposals and are required to submit a complete Cost Proposal. A proposal that is incomplete in any material respect may be rejected.

To expedite review of the proposals, Bidders are requested to submit proposals in separate Administrative, Technical, and Cost packages inclusive of all materials as summarized in Attachment A, Proposal Documents. This separation of information will facilitate the review of the material requested. No information beyond that specifically requested is required, and Bidders are requested to keep their submissions to the shortest length consistent with making a complete presentation of qualifications. Evaluations of the Administrative, Technical, and Cost Proposals received in response to this RFP will be conducted separately. Bidders are therefore cautioned not to include any Cost Proposal information in the Technical Proposal documents.

**DOH will not be responsible for expenses incurred in preparing and submitting the Administrative, Technical, or Cost Proposals.**

### **6.1 Administrative Proposal**

The Administrative Proposal should contain all items listed below. An Administrative Proposal that is incomplete in any material respect may be eliminated from consideration. The information requested should be provided in the prescribed format. Responses that do not follow the prescribed format may be eliminated from consideration. All responses to the RFP may be subject to verification for accuracy. Please provide the forms in the same order in which they are requested.

#### **A. Bidder's Disclosure of Prior Non-Responsibility Determinations**

Submit a completed and signed [Attachment 1](#), "Prior Non-Responsibility Determinations."

#### **B. Freedom of Information Law – Proposal Redactions**

Bidders must clearly and specifically identify any portion of their proposal that a Bidder believes constitutes proprietary information entitled to confidential handling as an exception to the Freedom of Information Law. See [Section 5.7](#), (Freedom of Information Law)

#### **C. Vendor Responsibility Questionnaire**

Complete, certify, and file a New York State Vendor Responsibility Questionnaire. DOH recommends that bidders file the required Vendor Responsibility Questionnaire online via the New York State VendRep System. To enroll in and use the New York State VendRep System, see the VendRep System Instructions at <http://www.osc.state.ny.us/vendrep/index.htm> or go directly to the VendRep System online at [www.osc.state.ny.us/vendrep](http://www.osc.state.ny.us/vendrep).

Bidders must provide their New York State Vendor Identification Number when enrolling. To request assignment of a Vendor ID or for VendRep System assistance, contact the OSC Help Desk at 866-370-4672 or 518-408-4672 or by email at [ciohelpdesk@osc.state.ny.us](mailto:ciohelpdesk@osc.state.ny.us).

Bidders opting to complete and submit a paper questionnaire can obtain the appropriate questionnaire from the VendRep website, [www.osc.state.ny.us/vendrep](http://www.osc.state.ny.us/vendrep), or may contact the Office of the State Comptroller's Help Desk for a copy of the paper form. Bidders should complete and submit the Vendor Responsibility Attestation, [Attachment 3](#).

#### **D. Vendor Assurance of No Conflict of Interest or Detrimental Effect**

Submit [Attachment 4](#), Vendor Assurance of No Conflict of Interest or Detrimental Effect, which includes information regarding the Bidder, members, shareholders, parents, affiliates and subcontractors. [Attachment 4](#) must be signed by an individual authorized to bind the Bidder contractually.

#### **E. M/WBE Forms**

Submit completed Form #1 and/or Form #2, Form #4 and Form #5 as directed in [Attachment 5](#), "Guide to New York State DOH M/WBE RFP Required Forms."

#### **F. Encouraging Use of New York Businesses in Contract Performance**

Submit [Attachment 6](#), "Encouraging Use of New York State Businesses in Contract Performance" to indicate the New York Businesses you will use in the performance of the Contract.

#### **G. Bidder's Certified Statements**

Complete, sign and submit [Attachment 7](#), "Bidders Certified Statements, which includes information regarding the Bidder, [Attachment 7](#), must be signed by an individual authorized to bind the Bidder contractually. Please indicate the title or position that the signer holds with the Bidder.

#### **H. Diversity Practices Questionnaire**

The DOH has determined, pursuant to New York State Executive Law Article 15-A, that the assessment of the diversity practices of respondents to this procurement is practical, feasible, and appropriate. Accordingly, respondents to this procurement should include as part of their response to this procurement, [Attachment 10](#) "Diversity Practices Questionnaire". Responses will be formally evaluated and scored.

#### **I. Executive Order 177 Prohibiting Contracts with Entities that Support Discrimination**

Bidder should complete and submit [Attachment 11](#) certifying that it does not have institutional policies or practices that fail to address the harassment and discrimination of individuals on the basis of their age, race, creed, color, national origin, sex, sexual orientation, gender identity, disability, marital status, military status, or other protected status under the Human Rights Law.

#### **J. Executive Order 16 Prohibiting Contracting with Businesses Conducting Business in Russia**

Bidder should complete and submit [Attachment 12](#) certifying the status of their business operations in Russia, if any, pursuant to Executive Order 16.

#### **K. State Finance Law Consultant Disclosure Provisions**

In accordance with New York State Finance Law Section 163(4)(g), State agencies must require all Contractors, including subcontractors, that provide consulting services for State purposes pursuant to a contract to submit an annual employment report for each such contract.

The successful bidder for procurements involving consultant services must complete a "State Consultant Services Form A, Contractor's Planned Employment From Contract Start Date through End of Contract Term" in order to be eligible for a contract.

The successful bidder must also agree to complete a "State Consultant Services Form B, Contractor's Annual Employment Report" for each state fiscal year included in the resulting contract. This report must be submitted annually to the Department, the Office of the State Comptroller, and Department of Civil Service.

Submit State Consultant Services Form A: Contractor's Planned Employment and Form B: Contractor's Annual Employment Report , available at: <http://www.osc.state.ny.us/agencies/forms/ac3271s.doc> and <http://www.osc.state.ny.us/agencies/forms/ac3272s.doc>.

#### **L. Sales and Compensating Use Tax Certification (Tax Law, § 5-a)**

Section 5-a of the Tax Law, as amended, effective April 26, 2006, requires certain Contractors awarded state contracts for commodities, services and technology valued at more than \$100,000 to certify to the Department of Tax and Finance (DTF) that they are registered to collect New York State and local sales and compensating use taxes. The law applies to contracts where the total amount of such contractor's sales delivered into New York State are in excess of \$300,000 for the four quarterly periods immediately preceding the quarterly period in which the certification is made, and with respect to any affiliates and subcontractors whose sales delivered into New York State exceeded \$300,000 for the four quarterly periods immediately preceding the quarterly period in which the certification is made.

This law imposes upon certain contractors the obligation to certify whether or not the contractor, its affiliates, and its subcontractors are required to register to collect state sales and compensating use tax and contractors must certify to DTF that each affiliate and subcontractor exceeding such sales threshold is registered with DTF to collect New York State and local sales and compensating use taxes. The law prohibits the State Comptroller, or other approving agencies, from approving a contract awarded to an offeror meeting the registration requirements but who is not so registered in accordance with the law.

The successful Bidder must file a properly completed Form ST-220-CA with the Department <sup>^</sup> and Form ST-220-TD with the DTF. These requirements must be met before a contract may take effect. Further information can be found at the New York State Department of Taxation and Finance's website, available through this link: <http://www.tax.ny.gov/pdf/publications/sales/pub223.pdf>.

Submit these Forms, available through these links:

- ST-220 CA: [http://www.tax.ny.gov/pdf/current\\_forms/st/st220ca\\_fill\\_in.pdf](http://www.tax.ny.gov/pdf/current_forms/st/st220ca_fill_in.pdf)
- ST-220 TD: [http://www.tax.ny.gov/pdf/current\\_forms/st/st220td\\_fill\\_in.pdf](http://www.tax.ny.gov/pdf/current_forms/st/st220td_fill_in.pdf)

#### **6.2 Technical Proposal**

The purpose of the Technical Proposal is to demonstrate the qualifications, competence, and capacity of the Bidder to perform the services contained in this RFP. The Technical Proposal should demonstrate the qualifications of the Bidder and the staff to be assigned to provide services related to the services included in this RFP.

A Technical Proposal that is incomplete in any material respect may be eliminated from consideration. The following outlines the information requested to be provided by Bidders. The information requested should be provided in the prescribed format. Responses that do not follow the prescribed format may be eliminated from consideration. All responses to the RFP may be subject to verification for accuracy.

While additional data may be presented, the following should be included. Please provide the information in the same order in which it is requested. Your proposal should contain sufficient information to assure DOH of its accuracy. Failure to follow these instructions may result in disqualification.

Pricing information contained in the Cost Proposal cannot be included in the Technical Proposal documents.

## **A. Title Page**

Submit a Title Page providing the RFP subject and number; the Bidder's name and address, the name, address, telephone number, and email address of the Bidder's contact person; and the date of the Proposal.

## **B. Table of Contents**

The Table of Contents should clearly identify all material (by section and page number) included in the Bidder's proposal.

## **C. Documentation of Bidder's Eligibility Responsive to Section 3.0 of RFP**

Bidders must be able to meet all the requirements stated in Section 3.0 of the RFP. The Bidder must submit documentation that provides sufficient evidence of meeting the criterion/criteria set forth in Section 3.0. This documentation may be in any format needed to demonstrate how the Bidder meets the minimum qualifications to propose.

- At least three (3) years of health care insurance industry actuarial experience;
- Employ an actuary who will be assigned to the contract that is a member of at least one of the following:
  - American Academy of Actuaries,
  - Fellow or Associate of the Society of Actuaries or the Casualty Actuarial Society,
  - Fellow of the Conference of Consulting Actuaries,
  - Member or a Fellow of the American Society of Pension Professional and Actuaries,
  - OR
  - Member of another International Actuarial Association member organization.

### **Documentation of Bidder's Preferred Qualifications Responsive to Section 3.0 of RFP**

The NYSDOH will give preference to Bidders that poses at least five (5) years of health care insurance industry actuarial experience.

## **D. Technical Proposal Narrative**

The Technical Proposal should provide satisfactory evidence of the Bidder's ability to meet, and expressly respond to, each element listed below.

A Technical Proposal that is incomplete in any material respect may be eliminated from consideration. The following outlines the information requested to be provided by Bidders. The information requested should be provided in the prescribed format. Responses that do not follow the prescribed format may be eliminated from consideration. All responses to the RFP may be subject to verification for accuracy.

While additional data may be presented, the following should be included. Please provide the information in the same order in which it is requested. Your proposal should contain sufficient information to assure DOH of its accuracy. Failure to follow these instructions may result in disqualification.

Pricing information contained in the Cost Proposal cannot be included in the Technical Proposal documents.

### **D1. Organization, Personnel and Experience**

Bidders should provide experience should be relevant to the scope of work to be performed in accordance with this RFP. Experience gained within the last five years should be emphasized. in relation to responsibilities set forth in Section 4.0 of this RFP and referenced attachments:

- i. A description of the Bidder's organizational structure, background and experience as it relates to the each of three studies listed below and as defined in Section 4.2 of this RFP;
  - Essential Health Benefits for NY State of Health

- Standard Plan Development and Insurer Participation
  - Section 1332 State Innovation Waiver Analysis
- ii. An organizational chart which clearly demonstrates how the Bidder intends to staff, as required in Section 4.5 of this RFP, for each of the three studies listed below and as defined in Section 4.2 of this RFP:
- Essential Health Benefits for NY State of Health
  - Standard Plan Development and Insurer Participation
  - Section 1332 State Innovation Waiver Analysis
- iii. A description of the Bidder's understanding and experience in conducting similar studies to those listed below and as defined in in Section 4.2:
- Essential Health Benefits for NY State of Health
  - Standard Plan Development and Insurer Participation
  - Section 1332 State Innovation Waiver Analysis QHP list studies
- iv. A description of the Bidder's organizational structure, background, understanding and experience as it relates to each of the other deliverable projects listed below and as defined in Section 4.3 of this RFP;
- Additional Policy Analysis
  - Modeling Impact of Federal and State Policy Changes on New York
  - Member-Level Health Plan Selection, Competition, and Stability in New York's Health Insurance Market
  - Dental Benefits
- v. An organizational chart which clearly demonstrates how the Bidder intends to staff, as required in Section 4.5 of this RFP, for each of the four studies listed below and as defined in Section 4.3 of this RFP:
- Additional Policy Analysis
  - Modeling Impact of Federal and State Policy Changes on New York
  - Member-Level Health Plan Selection, Competition, and Stability in New York's Health Insurance Market
  - Dental Benefits
- vi. A description of the Bidder's understanding and experience in conducting similar studies to those listed below and as defined in Section 4.3:
- Additional Policy Analysis
  - Modeling Impact of Federal and State Policy Changes on New York
  - Member-Level Health Plan Selection, Competition, and Stability in New York's Health Insurance Market
  - Dental Benefits

## **D2. Implementation Plan**

Bidders should propose a plan for implementing the activities and data responsibilities set forth in Sections 4.1 - 4.6 of this RFP. The plan should include at a minimum:

- i. A description of the Bidder's plan to develop each of the three studies listed below and as outlined in Section 4.2:
- Essential Health Benefits for NY State of Health
  - Standard Plan Development and Insurer Participation
  - Section 1332 State Innovation Waiver Analysis QHP list studies
- ii. A description of the Bidder's plan to develop, monitor, prepare each of the other deliverables listed below and in Section 4.3
- Additional Policy Analysis
  - Modeling Impact of Federal and State Policy Changes on New York

- Member-Level Health Plan Selection, Competition, and Stability in New York's Health Insurance Market
- Dental Benefits

iii. A description of the Bidder's plan to implement, respond, perform, track and report on the Task Order process as in section 4.4:

iv. A description of the Bidder's plan to perform, prepare and meet all reporting requirements associated with Section 4.6 of this RFP;

v. A description of electronic data processing equipment proposed to be utilized;

vi. A descriptions of all computer software proposed to be utilized;

vii. A description of the proposed Quality Control Plan for the work covered by this RFP;

viii. A description of the methods Bidder proposed to utilize to maintain the level of cooperation with DOH necessary for proper performance of all contractual responsibilities and to apprise DOH of any issues and status.

### **D3. Proposed Approach- Information Technology (see Scope of Work Section 4.7)**

Bidder's response to this RFP must include an attestation to the following: The application and all systems and components supporting it, including but not limited to any forms and databases that include Personal Health, Personal Identification or other New York State information, must comply with all NYS security policies and standards listed at <http://its.ny.gov/tables/technologypolicyindex.htm>.

### **D4. Proposed Approach- Security (see Scope of Work Section 4.8)**

Bidder's response to this RFP must include an attestation to the following: items (i-v) and describe their approach to Information Technology/Security that would accomplish the goals.

i. The selected Bidder shall comply with all privacy and security policies and procedures of the Department (<https://its.ny.gov/eiso/policies/security>) and applicable state and federal law and administrative guidance with respect to the performance of this contract. The Bidder is required, if applicable, to execute a number of security and privacy agreements with the Department including a Business Associate Agreement (Appendix H) and a Data Use Agreement (DUA) at contract signing.

ii. The selected Bidder is expected to provide secure and confidential backup, storage and transmission for hard copy and electronically stored information. Under no circumstances will any records be released to any person, agency, or organization without specific written permission of the DOH. The selected Bidder is obligated to ensure any Subcontractor hired by selected Bidder who stores, processes, analyzes or transmits MCD on behalf of selected Bidder has the appropriate Security requirements in place. selected Bidder is required to include in all contracts and Business Associate Agreements with their Subcontractors language surrounding the security and privacy requirements as well as the language contained in the Confidentiality Language for Third Parties section of the DUA. If any breach or suspected breach of the data or confidentiality occurs, whether the breach occurred with the selected Bidder or Subcontractor, DOH must be notified immediately.

iii. The selected Bidder is required to maintain and provide to the Department upon request their data confidentiality plans and procedures for meeting security requirements as they relate to the deliverables and services within this RFP, including all plans as they relate to subcontractor work where applicable.

iv. The selected Bidder will develop and maintain adequate fully trained staff to respond to all stakeholder inquiries while protecting confidentiality and maintaining the security and integrity of all systems. Staff must

be trained to understand and observe requirements related to confidentiality and operating guidelines for functions included in this RFP.

v. The selected Bidder will comply fully with all current and future updates of the security procedures of the DOH/HRI, as well as with all applicable State and federal requirements, in performance of this contract.

**D5. Proposed Approach- Transition (see Scope of Work Section 4.9)**

The Bidder should submit their approach to transition and their plan to securely and smoothly transfer any records referenced in Section 4.9.

**6.3 Cost Proposal**

Submit a completed and signed [Attachment B – Cost Proposal](#). The Cost Proposal shall comply with the format and content requirements as detailed in this RFP and in Attachment B. Failure to comply with the format and content requirements may result in disqualification.

**Cost Proposal Instructions:**

1. Bidders must propose a single all-inclusive price per unit for task orders. Price Ranges will be disqualified. Bidders must not include any assumptions or contingencies in their cost proposal.
2. The maximum allowable annual total bid cost may not exceed \$2,500,000.00. Proposals received above the maximum allowable annual total bid cost will be disqualified.
3. The all-inclusive price per unit proposed must include the costs of furnishing the said services, including but not limited to personnel and non-personnel expenses including all related costs such as salaries, fringe benefits, administrative/operating cost and fees, overhead, subcontracting, travel, presentation costs and profit to the satisfaction of the Department of Health and the performance of all work set forth in said specifications.
4. The Estimated Number of Hours per year in the bid documents represent minimum number of hours per year, based upon historical usage. These units are not a guarantee of work; actual quantities may vary up or down from year to year due to actual DOH needs. Payment is based upon actual quantities delivered, refer to Section 4.10 Payment.

**7.0 PROPOSAL SUBMISSION**

A proposal consists of three distinct parts: (1) the Administrative Proposal, (2) the Technical Proposal, and (3) the Cost Proposal. The table below outlines the requested format and volume for submission of each part. Proposals should be submitted in all formats as prescribed below.

	<b>Paper Submission</b>
<b>Administrative Proposal</b>	<b>3 Originals 3 Copies</b>
<b>Technical Proposal</b>	<b>3 Originals 6 Copies</b>
<b>Cost Proposal</b>	<b>3 Originals 3 Copies</b>

1. All hard copy materials should be printed on 8.5" x 11" white paper (single sided), be clearly page numbered on the bottom of each page with appropriate header and footer information and presented separately, in three-ring binders if necessary.
2. A type size of eleven (11) points or larger should be used.
3. Bid submissions should be submitted in a sealed package containing three separate envelopes, each clearly labeled with the bidder's name and "RFP Number 20253 /Actuarial Services".
  - a. Envelope one should be labeled "Administrative Proposal" and contain all items listed in Attachment A – Bid Package Checklist – Administrative Proposal Submission.
  - b. Envelope two should be labeled "Technical Proposal" and contain all items listed in Attachment A – Bid Package Checklist – Technical Proposal Submission.
  - c. Envelope three should be labeled "Cost Proposal" and contain all items listed in Attachment A – Bid Package Checklist – Cost Proposal Submission.
  - d. Within each envelope the originals and copies should be clearly labeled and numbered.
4. Where signatures are required, the Bids designated as originals should have a handwritten signature and be signed in blue ink.
5. The DOH discourages overly lengthy Bids. Therefore, marketing brochures, user manuals or other materials beyond that sufficient to present a complete Bid, are not desired and will not be reviewed or evaluated. Elaborate artwork or expensive paper is not necessary or desired. In order for the Department to evaluate bids fairly and completely, all Bids should follow the format described in this RFP and provide all requested information and no extraneous or additional information or material.
6. Audio and/or videotapes are not allowed. Any submitted audio or videotapes will be ignored by the evaluation teams.
7. In the event that a discrepancy is found between the copies and the originals, original #1 will prevail.

Proposals must be submitted, by U.S. Mail, by courier/delivery service (e.g., FedEx, UPS, etc.) or by hand as noted below, in a sealed package to:

Department of Health (RFP # 20253)  
 Attention: Nikki Arrington  
 Corning Tower Room 2580  
 Governor Nelson A. Rockefeller Empire State Plaza  
 Albany, NY 12237

NOTE: You should request a receipt containing the time and date received and the signature of the receiver for all hand-deliveries and ask that this information also be written on the package(s).

Submission of proposals in a manner other than as described in these instructions (e.g., fax) will not be accepted.

**The proposal must be received by the NYSDOH, no later than the Deadline for Submission of Proposals specified in [Section 1.0](#), (Calendar of Events). Late bids will not be considered.**

## **7.1 No Bid Form**

Bidders choosing not to bid are requested to complete the No-Bid form, [Attachment 2](#). Although not mandatory, such information helps the Department direct solicitations to the correct bidding community.

## **8.0 METHOD OF AWARD**

### **8.1 General Information**

DOH will evaluate each proposal based on the "Best Value" concept. This means that the proposal that best "optimizes quality, cost, and efficiency among responsive and responsible offerors" shall be selected for award (State Finance Law, Article 11, §163(1)(j)).



DOH, at its sole discretion, will determine which proposal(s) best satisfies its requirements. DOH reserves all rights with respect to the award. All proposals deemed to be responsive to the requirements of this procurement will be evaluated and scored for technical qualities and cost. Proposals failing to meet the requirements of this RFP may be eliminated from consideration. The evaluation process will include separate technical and cost evaluations, and the result of each evaluation shall remain confidential until evaluations have been completed and a selection of the winning proposal is made.

The evaluation process will be conducted in a comprehensive and impartial manner, as set forth herein, by an Evaluation Committee. The Technical Proposal and compliance with other RFP requirements (other than the Cost Proposal) will be weighted **70%** of a proposal's total score and the information contained in the Cost Proposal will be weighted **30%** of a proposal's total score.

Bidders may be requested by DOH to clarify the contents of their proposals. Other than to provide such information as may be requested by DOH, no Bidder will be allowed to alter its proposal or add information after the Deadline for Submission of Proposals listed in [Section 1.0](#) (Calendar of Events).

In the event of a tie, the determining factors for award, in descending order, will be:

- (1) lowest cost and
- (2) proposed percentage of M/WBE participation.

## **8.2 Submission Review**

DOH will examine all proposals that are received in a proper and timely manner to determine if they meet the proposal submission requirements, as described in [Section 6.0](#) (Proposal Content) and [Section 7.0](#) (Proposal Submission), including documentation requested for the Administrative Proposal, as stated in this RFP. Proposals that are materially deficient in meeting the submission requirements or have omitted material documents, in the sole opinion of DOH, may be rejected.

## **8.3 Technical Evaluation**

The evaluation process will be conducted in a comprehensive and impartial manner. A Technical Evaluation Committee comprised of Program Staff of DOH will review and evaluate all proposals. Proposals will undergo a preliminary evaluation to verify Minimum Qualifications to Propose (Section 3.0).

The Technical Evaluation Committee members will independently score each Technical Proposal that meets the submission requirements of this RFP. The individual Committee Member scores will be averaged and weighted to calculate the Technical Score for each responsive Bidder.

The Technical Proposal evaluation is **70% (up to 70 points)** of the final score.

## **8.4 Cost Evaluation**

The Cost Evaluation Committee will examine the Cost Proposal documents. The Cost Proposals will be opened and reviewed for responsiveness to cost requirements. If a cost proposal is found to be non-responsive, that proposal may not receive a cost score and may be eliminated from consideration.

The Cost Proposals will be scored based on a maximum cost score of 30 points. The maximum cost score will be allocated to the Cost Proposal with the lowest all-inclusive not-to-exceed maximum price. All other responsive proposals will receive a proportionate score based on the relation of their Cost Proposal to the Cost Proposal(s) offered at the lowest final cost, using this formula:

$$C = (A/B) * 30\%$$

A is Total price of lowest Cost Proposal;

B is Total price of Cost Proposal being scored; and

C is the Cost score.

The Cost Proposal evaluation is **30% (up to 30 points)** of the final score.

## 8.5 Composite Score

A composite score will be calculated by the DOH by adding the Technical Proposal points and the Cost Proposal points awarded. Finalists will be determined based on composite scores.

## 8.6 Award Recommendation

The Evaluation Committee will submit a recommendation for award to the Bidder(s) with the highest composite score(s) whose experience and qualifications have been verified.

The DOH will notify the awarded Bidder(s) and Bidders not awarded. The awarded Bidder(s) will enter into a Contract substantially in accordance with the terms of Attachment 8, DOH Agreement, to provide the required product(s) or services as specified in this RFP. The resultant Contract shall not be binding until fully executed and approved by the New York State Office of the Attorney General and the Office of the State Comptroller.

## 9.0 ATTACHMENTS

The following attachments are included in this RFP and are available via hyperlink or can be found at:

<https://www.health.ny.gov/funding/forms/>.

1. [Bidder's Disclosure of Prior Non-Responsibility Determinations](#)
2. [No-Bid Form](#)
3. [Vendor Responsibility Attestation](#)
4. [Vendor Assurance of No Conflict of Interest or Detrimental Effect](#)
5. [Guide to New York State DOH M/WBE Required Forms & Forms](#)
6. [Encouraging Use of New York Businesses in Contract Performance](#)
7. [Bidder's Certified Statements](#)
8. [DOH Agreement](#) (Standard Contract)
9. Intentionally Omitted
10. [Diversity Practices Questionnaire](#)
11. [Executive Order 177 Prohibiting Contracts with Entities that Support Discrimination](#)
12. [Executive Order 16 Prohibiting Contracting with Business Conducting Business in Russia](#)

The following attachments are attached and included in this RFP:

- A. Proposal Document Checklist
- B. Cost Proposal

**ATTACHMENT A  
PROPOSAL DOCUMENT CHECKLIST**

Please reference Section 7.0 for the appropriate format and quantities for each proposal submission.

<b>RFP20253 – Actuarial Services</b>		
<b>FOR THE ADMINISTRATIVE PROPOSAL</b>		
<b>RFP §</b>	<b>SUBMISSION</b>	<b>INCLUDED</b>
§ 6.1.A	Attachment 1 - Bidder's Disclosure of Prior Non-Responsibility Determinations	<input type="checkbox"/>
§ 6.1.B	Freedom of Information Law – Proposal Redactions (If Applicable)	<input type="checkbox"/>
§ 6.1.C	Attachment 3 - Vendor Responsibility Attestation	<input type="checkbox"/>
§ 6.1.D	Attachment 4 - Vendor Assurance of No Conflict of Interest or Detrimental Effect	<input type="checkbox"/>
§ 6.1.E	M/WBE Participation Requirements:	<input type="checkbox"/>
	Attachment 5 - Form 1	<input type="checkbox"/>
	Attachment 5 - Form 2 (If Applicable)	<input type="checkbox"/>
	Attachment 5 - Form 4	<input type="checkbox"/>
	Attachment 5 - Form 5 (If Applicable)	<input type="checkbox"/>
§ 6.1.F	Attachment 6 - Encouraging Use of New York Businesses	<input type="checkbox"/>
§ 6.1.G	Attachment 7 - Bidder's Certified Statements	<input type="checkbox"/>
§ 6.1.H	Attachment 10 - Diversity Practices Questionnaire	<input type="checkbox"/>
§ 6.1.I	Attachment 11 - EO 177 Prohibiting Contracts with Entities that Support Discrimination	<input type="checkbox"/>
§ 6.1.J	Attachment 12 – EO 16 Contracting with Businesses Conducting Business in Russia	<input type="checkbox"/>
§ 6.1.K	State Finance Law Consultant Disclosure	<input type="checkbox"/>
§ 6.1.L	Sales and Compensating Use Tax Certification	<input type="checkbox"/>
<b>FOR THE TECHNICAL PROPOSAL</b>		
<b>RFP §</b>	<b>SUBMISSION</b>	<b>INCLUDED</b>
§ 6.2.A	Title Page	<input type="checkbox"/>
§ 6.2.B	Table of Contents	<input type="checkbox"/>
§ 6.2.C	Documentation of Bidder's Eligibility (Requirement)	<input type="checkbox"/>
§ 6.2.D	Technical Proposal Narrative	<input type="checkbox"/>
<b>FOR THE COST PROPOSAL REQUIREMENT</b>		
<b>RFP §</b>	<b>REQUIREMENT</b>	<b>INCLUDED</b>
§ 6.3	Attachment B- Cost Proposal	<input type="checkbox"/>

**ATTACHMENT B  
COST PROPOSAL  
RFP #20253**

**Cost Proposal Instructions:**

1. Bidders must propose a single all-inclusive price per unit for task orders. Price Ranges will be disqualified. Bidders must not include any assumptions or contingencies in their cost proposal.
2. The maximum allowable annual total bid cost may not exceed \$2,500,000.00. Proposals received above the maximum allowable annual total bid cost will be disqualified.
3. The all-inclusive price per unit proposed must include the costs of furnishing the said services, including but not limited to personnel and non-personnel expenses including all related costs such as salaries, fringe benefits, administrative/operating cost and fees, overhead, subcontracting, travel, presentation costs and profit to the satisfaction of the Department of Health and the performance of all work set forth in said specifications.
4. The Estimated Number of Hours per year in the bid documents represent minimum number of hours per year, based upon historical usage. These units are not a guarantee of work; actual quantities may vary up or down from year to year due to actual DOH needs. Payment is based upon actual quantities delivered, refer to Section 4.10 Payment.

**ALL-INCLUSIVE HOURLY BASED PRICING:**

Bidders must propose a single all-inclusive hourly rate for years 1- 3 and a separate single all-inclusive hourly rate for years 4-5 of the contract. The single all-inclusive hourly rate proposed for years 4 and 5 may not exceed 3% of the single all-inclusive hourly rate proposed for that Staff Level for years 1-3.

Bidders must also list their Staff Titles they assign for billing at each Level of Staff.

It is estimated that billable hours for the contract period, shall be divided among the three (3) Staff Levels below as 30% for Level 1, 45% for Level 2 and 25% for Level 3. Percent of billable hours is an estimate based on historical data. Estimates are based upon historical usage and are not guaranteed, actual staff Level usage and hours will likely vary from these estimates during the term of the contract.

Level of Staff	Proposed Hourly Rate Per Staff Level for Years 1-3	Proposed Hourly Rate Per Staff Level Years 4-5	Annual Anticipated Hours* Per Level	List of Bidder's Staff Titles Assigned this Level
Level 1	\$	\$	9600	
Level 2	\$	\$	14400	
Level 3	\$	\$	8000	

**EXAMPLES OF EXPERIENCE AND DUTIES BY STAFFING LEVEL:**

For purposes of this proposal, use the following guidelines in assigning staff to one of the three staffing levels listed below. This is only to be used as a guide and is not all inclusive of staff types, experience and/or duties, but is representative of the level of staff DOH may require to perform such task.

**Level 1 Staff:**

Staff Types:

Principals, Partners, Project Leaders, Lead Consultants, or other staff with similar responsibilities.

Experience:

These staff have extensive experience and knowledge of actuarial activities related to setting rates and evaluating methodologies. These upper-level staff are seasoned professionals with generally 10-15 years of experience, and may be an actuary, accountant or a Fellow of the Society of Actuaries (FSA).

General Duties:

Project oversight, management of Contractor’s team, liaison with DOH, client relationships, and global policy development.

**Level 2 Staff:**

Staff Types:

Associates, Consultants, Senior Analysts, or other staff with similar responsibilities.

Experience:

These staff are mid-level professionals with generally 5-10 years of increasing responsibility and independent analysis work and experience, require little supervision.

General Duties:

Analyze data and form preliminary conclusions and/or recommendations, but report to Level 1 staff for overall direction on project, specific policy interpretation, and may supervise lower-level staff.

**Level 3 Staff:**

Staff Types:

Analysts, Consulting Assistants, or other staff with similar responsibilities.

Experience:

These staff are entry level professionals with less than 5 years’ experience. They work under direct supervision of Level 2 staff.

General Duties:

Technical support and data manipulation, but not necessarily drawing conclusions or making recommendations.

By signing this Cost Proposal Form, bidder agrees that the prices above are binding for 365 days from the proposal due date.

\_\_\_\_\_  
Bidder’s Authorized Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title