



Office of Procurement Services

P.O. Box 7800 • 315 W. Main St., Suite 441 • Tavares, FL 32778

Solicitation Number: **21-0521**

Solicitation Title: **ACTUARY SERVICES FOR THE GOVERNMENTAL ACCOUNTING STANDARD BOARD (GASB) ISSUED STATEMENT 75**

Last Day to Ask Questions: **05/13/2021**

CLOSING DATE: **05/20/2021**

CLOSING TIME: **3:00 P.M. Eastern**

Vendors shall complete and return all information requested by the specified time and date or Submittal shall be rejected.

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**1.0 PURPOSE OF SOLICITATION**

The purpose of this solicitation is to solicit competitive sealed submittals to furnish **ACTUARY SERVICES FOR THE GOVERNMENTAL ACCOUNTING STANDARD BOARD (GASB) ISSUED STATEMENT 75** for Lake County, Florida. This solicitation is officially posted on the County's website exclusively.

**1.1 EXHIBITS**

Exhibit A – Scope of Work

Exhibit B – Insurance Requirements

Exhibit C – Review the Lake County General Terms and Conditions page dated 10/10/2019.

**1.2 ATTACHMENTS**

Attachment 1 – Submittal Form

Attachment 2 – Pricing Sheet

Attachment 3 – Reference Form

Attachment 4 – Team Composition Form

**2.0 POINT OF CONTACT**

Direct all inquiries to the Contracting Officer (official point of contact) listed:

Amy Munday, Contracting Officer II

Telephone: 352-343-9768

E-mail: [amunday@lakecountyfl.gov](mailto:amunday@lakecountyfl.gov)

**3.0 QUESTIONS, EXCEPTIONS, AND ADDENDA**

Vendors must examine all solicitation documents including the Lake County General Terms and Conditions page. All communication, inquiries, or requests for exceptions are to be directed to the Contracting Officer listed in Section 2.0. The last day for questions or requests for exceptions is **05/13/2021**. An addendum may be issued in response to any inquiry received, which changes or clarifies the terms, provisions, or requirements of the solicitation. No answers given in response to questions submitted will be binding upon this solicitation unless released in writing as an addendum to the solicitation and posted on the Lake County Formal Solicitation site for this solicitation. Where there appears to be a conflict between this solicitation and any addenda, the last addendum issued will prevail.

It is the Vendor's responsibility to ensure receipt of all addenda and any accompanying documentation. Failure to acknowledge each addendum may prevent the proposal from being considered for award. The solicitation due date is static unless notified via addendum.

Process clarification or procedure questions may be asked at any time to the Contracting Officer.

**4.0 METHOD OF AWARD**

Each Submittal will be evaluated for conformance as responsive and responsible using the following criteria:

- A. Proper submittal of ALL documentation as required by this Solicitation. (Responsive)
- B. The greatest benefits to Lake County as it pertains to: (Responsible)
  1. Firm's qualifications;

2. Past Performance. In order to evaluate past performance, all Vendors are required to submit at least three verifiable references / relevant projects completed within the last three years that are the same or similar in magnitude to this Solicitation. The County may be listed as a reference. Use Attachment 3 – References Form;
3. Proposed costs / fee schedule;
4. Proposed materials and plans to accomplish tasks;
5. All technical specifications associated with this Solicitation;
6. Financial Stability: A Dun and Bradstreet report may be used by the County to evaluate Vendor's financial stability. All Vendors shall be prepared to supply a financial statement upon request, preferably a certified audit of the last available fiscal year.

Awards will be made to the most responsive, responsible Vendor whose Proposal represents the best overall value to the County when considering all evaluation factors (no additional details).

The County reserves the right to make awards to one or more Vendors to reject any and all offers or waive any minor irregularity or technicality in Proposals received.

Proposals received before the closing date and time listed will be opened, recorded, and accepted for consideration. Vendors' names will be read aloud and recorded. Proposals will be available for inspection during normal business hours from the Office of Procurement Services 30 calendar days after the solicitation due date or after recommendation of award, whichever occurs first.

## 5.0 DELIVERY AND SUBMITTAL REQUIREMENTS

- A. Hand delivery of submittals will not be accepted.
- B. RESPONSES MUST BE SUBMITTED THROUGH THE SOLICITATION RESPONSE PORTAL TO BE CONSIDERED – [Click Here for the Submission Portal.](#)
- C. A response will not be accepted if completed and submitted after the official due date and time.
- D. Submission indicates a binding offer to the County and agreement of the terms and conditions referenced in this Solicitation. Do not make any changes to the content or format of any form without County permission. All information must be legible.
- E. Submittal must be organized into the following major sections. Create and upload a file for each section:
  1. **Vendor Profile**
    - Statement of Interest & Understanding of Project.
    - Confirmation of being in the business of health and pension actuarial analysis and have proven quantifiable ability in this area for a period of no less than five (5) years.
    - Firm Profile / Firm History.
    - Completed Attachment 3 – Reference Form.
    - Completed Attachment 4 – Team Composition Form
    - Program Manager: List the name, business address, telephone number and e-mail address of the program manager for the project. Provide a resume of the individual's background and skills in managing similar projects.
    - Include copies of any required licenses or permits.

**2. Forms**

- Completed Attachment 1 – Submittal Form;
  - Submittal must be signed by an official authorized to legally bind the firm to its provisions. Include a memorandum of authority signed by an officer of the company if the signor is not listed as a corporate officer on the firm’s SunBiz registration.
- Proof of [Sunbiz.org](http://Sunbiz.org) registration;
- Include a completed W-9 form;
- Completed Addenda issued. Failure to include signed addenda may be cause for Submittal to be considered non-responsive;
- Proof of insurance or evidence of insurability at levels in Exhibit B – Insurance Requirements;

**3. Proposed Solution**

- Provide a concise description of the approach and process to successfully complete the work to be performed including any specific staffing or equipment resources. Multiple alternate solution Proposals may be submitted with the same degree of detail.
- A list of communication protocols, transmission formats and time frames necessary to successfully received the information.
- A list of normal demographic data fields that you would request from your clients;
- Any additional services your firm is proposing that will benefit the County

**4. Subcontractors/Joint Ventures**

- Provide a list of proposed subcontractors or joint venture arrangements that may be used on the project. Provide the same information required in the Pricing Proposal for each sub-vendor or joint venture participant.

**5. Completed Pricing Sheet**

- Completed Attachment 2 – Pricing Sheet;
- Provide supporting documentation for proposed pricing.

**6. Financial Stability**

- Provide a financial stability statement indicating the firm has the necessary resources (human and financial) to provide the services at the level required by the County. The County reserves the right to request a financial statement, a certified audit, or a third party prepared financial statement. The County reserves the right to use a third-party company to verify financial information provided. Provide similar information for a subcontractor or joint venture arrangement.

**7. Litigation**

- Provide information on the nature and outcome of litigation and proceedings for the previous three (3) years where the firm has been involved in any matter related to professional activities.

**F. PRESENTATIONS/ POST-DISCUSSIONS AFTER PROPOSAL RESPONSE**

1. The County, at its sole discretion, may ask for an oral presentation or demonstration without charge to the County. The County reserves the right to require the Vendor to

- demonstrate to the satisfaction of the County that the Firm has the fiscal and technical ability to furnish the requirements of the RFP. The demonstration must satisfy the County and the County will be the sole judge of compliance.
2. The County may commence contract negotiations in accordance with the method of award specified. The County reserves the right to conduct discussions with Vendors having a realistic possibility of contract award to include requests for additional information and requests for “best and final” offers.
  3. Vendors must not assume they will be asked to make a presentation or asked for a “best and final” offer and must include all pertinent and required information in their original Proposal.
- G. The County is not liable or responsible for any costs incurred in responding to this Solicitation including, without limitation, costs for product or service demonstrations if requested.
- H. Interested parties may listen to the 3:01 P.M. solicitation opening by calling 1-321-332-7400, Conference ID 971 920 36# or clicking on this link: [Join Microsoft Teams Meeting](#)
- I. The County owns and retains all proprietary rights in its logos, trademarks, trade names, and copyrighted images (Intellectual Property). Nothing in this solicitation permits or shall be construed as authorization to use or display County’s Intellectual Property on Respondent’s submittal documents or proposal (including any exhibits attached thereto) in response to this solicitation. Unless expressly authorized in writing by County, a Respondent is not authorized and shall not make use of or display any County Intellectual Property on or in its proposal or submittals. Unauthorized use of County’s Intellectual Property may constitute trademark and copyright infringement in violation of federal and state laws. It is a violation of Lake County Code Section 2-1 and deemed a second-degree misdemeanor under Florida Statutes Section 165.043.

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