



RFP PS-24-0310  
Actuarial Services for MERP, LTD and  
Sick Leave Benefits

Thursday, August 29, 2024 – 10:00 a.m.  
Via WebEx

**City of Phoenix**  
Finance Department



# Housekeeping

- Please turn off or silence cell phones during this pre-offer conference.
- Please mute your microphones, unless you are speaking, to mitigate background noise and potential electronic feedback for the other participants.
- We will be touching on each major section of the solicitation, please try and limit your questions to the section being discussed.
- Please email your company name, first and last name, telephone number, and email address to the procurement officer: [william.langbehn@phoenix.gov](mailto:william.langbehn@phoenix.gov)



# Legal Notice

The purpose of the Pre-Offer Conference is to provide a casual atmosphere to discuss the City's intent and to determine whether the City's requirements are clearly stated.

Although an exchange of information may take place, the official position of the City is that which is delivered in the solicitation document and in the form of a written Solicitation Addendum. Therefore, nothing said here today should be construed as a change to the written requirements in the solicitation document.

Any changes will be in the form of a solicitation addendum. Vendors must acknowledge receipt of any/all addenda by signing and returning the document with their submittal, or the response may be considered non-responsive.

Please note that it is the responsibility of the Offeror to read the entire solicitation document. Offerors must contact the Procurement Officer if they have any questions – no other City employees per the Transparency Policy.



# Key Dates

Pre-Offer Conference

August 29, 2024,  
at 10:00 am

Written Inquiries Due

September 5, 2024,  
at 2:00 pm

Offer Due Date

September 19, 2024,  
at 2:00 pm



# Agenda

RFP PS-24-0310

Actuarial Services for MERP, LTD and Sick Leave Benefits

1. Review Solicitation Instructions
2. Review Special Terms and Conditions
3. Review Insurance and Indemnification Requirements
4. Review the Scope of Work
5. Review Submittal Requirements
6. Review Evaluation Criteria
7. Closing



# Solicitation Instructions

- Transparency Policy starts at solicitation opening and ends at Council Award
- All offerors must register at:  
<https://www.phoenix.gov/procure>
- All written inquiries are due **September 5, 2024, at 2:00 pm**
- The City will not be responsible for oral instructions made by employees or officers, any changes will be in the form of solicitation addenda
- Businesses ***must*** be registered with the Arizona Corporation Commission (this is checked)
- Offeror must read the entire solicitation and accept all terms and conditions without exception



# Special Terms & Conditions

- All prices offered shall be firm and fixed for the entire term of the contract. (2.5.2. Price)
- Miscellaneous Fees will not be paid. These costs must be incorporated in the pricing provided. (2.5.15. Miscellaneous Fees)
- Background screening of all contract employees is required, and the City has set this contract at the Maximum Risk level (2.5.25. Background Screening & 2.5.31. Background Screening – Maximum Risk)
- Please pay special attention to the Confidentiality and Data Security provisions within the solicitation (2.5.34 Confidentiality & 2.5.35. Data Protection)



# Insurance & Indemnification

- Please note the Indemnification provisions within the solicitation (2.6.1. Professional Services)
- Insurance requirements cover:
  - Commercial General Liability
  - Automobile Liability
  - Worker's Compensation and Employers' Liability
  - Professional Liability (Errors and Omissions Liability)
- Upon award, certificates of insurance (ACORD form or equivalent) must be provided to the City within 10-days
- Send to the Procurement Division at [procurement@phoenix.gov](mailto:procurement@phoenix.gov)





# Scope of Work (Overview)

- Scope of Work (2.2.1. Scope of Work)
  - General information/background
- General Requirements (2.2.2. General Requirements)
  - Requirements for the Vendor/Business providing the requested services
- Specific Requirements (2.2.3. Specific Requirements)
  - Requirements for the Contractors/Employees of the Vendor/Business providing the requested services
- Deliverables (2.2.4. Deliverables)
  - See next page for specifics
- Price (2.2.5. Price)
  - Directions for submitting the Fee Schedule/Pricing Proposal
  - Additional actuarial services not specified



# Scope of Work (Deliverables)

## Deliverables (2.2.4. Deliverables)

- Sick Leave Benefits – GASB 16 reporting (2.2.4.A.)
- Long Term Disability – Valuation and GASB Report (2.2.4.B.)
- Medical Expense Reimbursement Plan – Valuation and GASB Report (2.2.4.C.)
- For each:
  - Type of Report
  - Due date
  - Additional needs (Roll Forwards)
  - Specifications
  - Contents required



# Submittals

- Responses must be received by email. Please submit an electronic copy of the Submittal Section and all other required documentation to [procurement@phoenix.gov](mailto:procurement@phoenix.gov)
- Be sure to include references (Submittals - References rev 2-2023), as these are also checked
- Be sure to complete and include:
  - Costs and Payments rev 2-2023
  - Pricing\_Proposal RFP PS-24-0310
  - Submittals - Debarment & Exclusion rev 2-2023
  - Conflict of Interest and Transparency Form
  - Submittals - Offer Page rev 3-2023
- Bidder must acknowledge receipt and acceptance of all addenda by signing and returning all addenda with the proposal submittal.



# Evaluation Criteria

- Each Proposal submitted must have four parts. Proposals will be evaluated based upon the following criteria (1.31. Evaluation Criteria):
  - Qualifications & Experience 200
  - Method of Approach 300
  - Capacity 300
  - Pricing 200
  - Total Points Available 1000
- See pages 16 – 18 for the specific questions to be evaluated.



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INFORMATION**

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at 2:00 pm

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at 2:00 pm