

**TOWN OF GUILFORD
REQUEST FOR QUALIFICATIONS AND PROPOSALS
RFQ/RFP #3-1819
PENSION and OTHER POST-EMPLOYMENT BENEFITS ACTUARIAL SERVICES**

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I.

**LEGAL NOTICE
TOWN OF GUILFORD
REQUEST FOR QUALIFICATIONS AND PROPOSALS
RFQ/RFP #3-1819**

PENSION and OTHER POST-EMPLOYMENT BENEFITS ACTUARIAL SERVICES

The Town of Guilford is seeking competitive proposals for a qualified firm to provide Pension and OPEB Actuarial Services. Respondents are required to submit five (5) copies of their fee proposal and qualification statement in sealed envelopes together with an electronic copy of the qualification statement only by no later than March 26, 2019 at 2:00 p.m. in the Office of the First Selectman, Second Floor, 31 Park Street, Guilford, Connecticut 06437. Late submittals will be rejected. Respondents should submit the fee proposal in a separate sealed envelope. All submittals should be labeled with RFQ/RFP number and RFQ/RFP title.

Project specifications may be obtained at the Office of the First Selectman or may be accessed from the Town of Guilford's website at www.ci.guilford.ct.us or the Connecticut Department of Administrative Services procurement website. Questions regarding the specifications may be directed, in writing only, to Maryjane Malvasi, Finance Director at malavasim@ci.guilford.ct.us with a copy to the Purchasing Department at querciak@ci.guilford.ct.us and millmanp@ci.guilford.ct.us.

Each respondent shall honor their proposal for ninety (90) business days from the date of proposal opening, without modification. Upon award of the RFQ/RFP, the winning respondent shall be bound by the proposal price throughout the contract period.

The Town of Guilford reserves the right to reject any or all proposals; or to waive defects in same, if it deems such to be in the best interest of the Town. The Town of Guilford is an affirmative action, equal opportunity employer.

Matthew T. Hoey III
First Selectman

Publish one time only in the New Haven Register under LEGAL NOTICES on February 22, 2019.

II. GENERAL SPECIFICATIONS

A. PURPOSE

The Town of Guilford ("the Town"), on behalf of its three single-employer Defined Benefit Pension Plans: Employees' Pension Plan, Police Retirement Fund, and Public School Employees' (Non-Certified) Pension Plan (collectively "the Plan or Plans") intends to enter into a contract for pension and Other Post-Employment Benefits (OPEB) actuarial services. The Town is seeking professional actuary services to perform pension plan and ("OPEB") valuations and other related services as required by current of future Government Accounting Standards Board (GASB) pronouncements. The purpose of this Request for Qualifications and Proposals (RFQ/RFP) is to define the Town's scope-of-services, solicit qualifications and proposals, and thereby help gather adequate information from which the Town may evaluate interested providers of such services.

B. GENERAL INFORMATION

The Town of Guilford is a town of approximately 22,000 residents located along the Connecticut shoreline in New Haven County. The Town operates under the provision of its Charter, General Statutes of Connecticut, and has a Town Meeting/Board of Selectmen form of government. Administration of the Plans rests with the five-member Pension Committee, which is appointed by the Board of Selectmen.

C. OVERVIEW OF EXISTING PLANS

The Town of Guilford currently administers and maintains the previously described three single-employer Defined Benefit Pension Plans to provide retirement benefits to many of our full-time Town Employees, except for Public Works personnel, who are covered by the multi-employer New England Teamsters and Trucking Industry Pension Fund and certified personnel of the Board of Education, who are covered under the State of Connecticut Teachers' Retirement System. Employee contributions to the Plans vary by individual and collective bargaining contracts.

There are currently fifteen (15) investment managers for the Plan, of which six (6) are domestic equity managers, four (4) are international equity managers, one (1) is an international emerging stock manager, three (3) are fixed income managers, and one (1) is a real estate investment trust. The market value of the Plan was \$58,861,350 as of December 31, 2018 with 392 members as of the July 1, 2018 actuarial valuation. Membership in the Plans consists of 226 active members, 33 terminated vested members, and 133 retired members.

The Plans are now closed and all new full-time Employees are enrolled in a 401(a) Defined Contribution Plan administered by ICMA-RC.

The Town currently funds its OPEB obligation on a pay-as-you go basis. The level of accrued benefits varies by bargaining unit and provisions provided for in each collective bargaining agreement. As of the July 1, 2016 OPEB Valuation, there were 491 active participants and 95 retirees or spouses of retirees.

All prospective bidders are strongly encouraged to review the Pension & OPEB disclosures in the Town's June 30, 2018 Comprehensive Annual Financial Report available on the Town's website.

D. WORK STATEMENT

The Actuary shall annually conduct actuarial valuations and a review of each of the Town's Plans and biannually OPEB as of July 1st and shall prepare a separate written report thereon for each of the Plans and OPEB. Each report shall include all data necessary to meet the requirements of Governmental Accounting Standards Board (GASB) Statements (ex. GASB 67/68) and the requirements of any future GASB pronouncements, as well as the data necessary to prepare any reports required by the federal government relative to the Plans. All actuarial valuations shall be based on census information provided to the actuary by the Town, and on such actuarial assumptions that the Town and the actuary agree are reasonable and appropriate in the circumstances. The report shall also set forth the actuary's actuarially determined contribution for the Town's fiscal year beginning on the following July 1st.

The selected firm will attend at least one Pension Committee meeting to present and discuss the valuation reports and will demonstrate extensive successful experience and superior capability for providing advisory services. Meetings are currently held at 8:00 AM on the 3rd Wednesday of the month.

In general, the selected firm will assist the Town in the on-going process of management of the Plans. In all cases, the firm and its Advisor will offer advice to the Town that is in the best interest of the Town, Plan participants and beneficiaries of the Plans.

E. PERIOD OF ENGAGEMENT

The Town is soliciting proposals for actuarial services as described herein for a five (5) year term with three (3) one-year optional renewals. The annual fee related to this contract is subject to annual appropriation by the Town. If there is no annual appropriation, then the contract will become null and void and of no force and effect. Both the Town and the Actuary will have the right, under the terms of the proposed contract, to cancel the contract as of June 30th of any year on written notice to the other party at least sixty days prior to that June 30th.

MINIMUM QUALIFICATIONS

Eligible proposers will be those firms that have the following qualifications:

1. Experience and expertise in regard to providing the types of or similar services as those outlined in the Scope of Services in this RFQ/RFP.
2. A proposer with a proven track record in providing these types of or similar services for similar-sized municipal governments.
3. Expert knowledge of Federal and State laws and regulations governing the services outlined in the scope of services.
4. Expert knowledge of Government Accounting Standards Board - Statements governing the services outlined in the scope of services.

The key professional and/or organization must not have, nor could they potentially have, a material conflict of interest with the Pension Committee.

F. SCOPE OF SERVICES

Contractual services for pension investment consulting will include, but not be limited to the following:

1. As of June 30 of each year, an annual formal valuation of the assets and liabilities of the Plan with valuation report to the Pension Board which includes recommended employer contribution for the current and subsequent year.
2. Review of actuarial assumptions used in the valuation for appropriateness.
3. Assist in the analysis of financial input of proposed Plans changes.
4. Assist, upon request, the Pension Committee in the preparation of documents required.
5. Assist in the implementation of recommendations made by the independent auditors concerning the Plans.
6. Assist, upon request, the Town in the determination of benefits for individual employees.
7. Submit annually, in accordance with a schedule established by the Town, information regarding Plans assets and liabilities required for annual financial statements preparation.

8. Advise the Town on all federal and state law compliance requirements for the Plans. Provide an analysis of the impact of proposed and enacted federal and state laws and other regulatory pronouncements.
9. Provide factors, formulas, and other information required by the town for effective administration of the Plans.
10. Prepare annually a report to the Pension Committee which identifies issues which could impact the Plans in the upcoming calendar year.
11. Coordination of upcoming liability estimates with investment consultant and Pension Committee in order to assure availability of assets to match liabilities.
12. Prepare and produce annual employee benefit statements which include:
 - a. Narrative introduction
 - b. Employee census data
 - c. Normal retirement date and entitlement
 - d. Employee contributions with interest
13. Counsel the Town, upon request, on issues other than items 1-12 above which many impact the Plans. It is suggested that the following process be used for issues outside of items 1-12 above:
 - a. The Pension Committee defines the issues and requested service.
 - b. The Consulting Actuary provides a cost estimate.
 - c. The Consulting Actuary provides a report on the issue and presents to the Pension Committee.
14. The following schedule for reporting shall be followed:
 - a. Defined Benefit Pension Plan Valuation – Issue Annually by November 15
 - b. Defined Benefit GASB Disclosure Reports – Issue Annually by September 15
 - c. Other Post-Employment Benefits Plan Valuation – Issue biennially by November 15
 - d. Other Post-Employment Benefits GASB Disclosure Report – Issue annually by September 15

III. SUBMISSION OF QUALIFICATION STATEMENTS /FEE PROPOSALS

A. SUBMISSION REQUIREMENTS

To achieve a uniform review process and obtain the maximum degree of comparability, it is required that the proposal be organized in the following manner:

1. Title Page: Please indicate the RFQ/RFP subject, the name of your organization, address, telephone number, name of contact person and date.
2. Table of Contents: Clearly identify the material by section and page number.
3. Letter of Interest
4. Firm description:
 - State your firm’s philosophy and approach in undertaking the services of the nature outlined in the RFQ/RFP, as well as a description of its primary business focus along with a detailed description of its municipal audit services group.
 - Describe the resources the firm currently has for effective delivery of these actuarial services.
 - What quality control and scheduling procedures does the firm employ to assure that the services provided are of acceptable quality and timely?
5. Personnel and Geography:
 - What is the number of full time employees in your firm?
 - What is the location of your nearest office to Guilford, Connecticut?
 - Provide a breakdown by classification (executive, professional or clerical) for both your national and local operation.
6. Staffing and Continuity:
 - Please submit biographical profiles, including actuarial credentials, on the individual(s) who will be assigned to our account and the person to whom they report.
 - Where are these individuals located? Who will attend review meetings? Will the same person(s) always be representing your firm?
 - How many clients have you lost within the last three (3) years? How many clients have you gained in the last three (3) years?
 - Please submit the matrix below to indicate your level of Connecticut Municipal Staffing:

| CT Municipal Pension Staff | Total number of staff persons | Number of additions within the last three years | Number of departures within the last three years |
|-----------------------------------|--------------------------------------|--|---|
| Executive Staff | | | |
| Professional Staff | | | |

| | | | |
|----------------|--|--|--|
| Clerical Staff | | | |
|----------------|--|--|--|

7. Experience:

- Number of retirement plans for which actuarial consulting services are provided:
 - By the firm overall
 - By the office of the firm that will service this account
 - By the Project Manager/Leader who will service this account

- Number of qualified municipal retirement plans for which actuarial consulting services are provided:
 - By the firm overall
 - By the office of the firm that will service this account
 - By the Project Manager/Leader who will service this account

- List five (5) clients with plans similar to ours that we may contact for references. Please provide information in a table with the following information:
 - Plan Name
 - Number of Employees
 - Number of Retirees
 - Number of Vested Members
 - Value of Assets
 - Client since when?
 - Contact Person name and telephone number

- Number of municipal programs for which actuarial consulting services are proved for OPEB:
 - By the firm overall
 - By the office of the firm that will service this account
 - By the Project Manager/Leader who will service this account

- Describe the research capacity of your firm and explain how it may benefit the Pension Committee.

8. Failure to Complete Work, Default and Litigation.

- Have you ever failed to complete any work awarded to you? If so, where and why?
- Have you ever defaulted on a contract? If so, where and why?

- Is there any pending litigation which could affect your organization's ability to perform this agreement? If so, please describe.
- Has your firm ever had a contract terminated for cause within the past five years? If yes, provide details.
- Has your firm been named in a lawsuit related to errors and omissions within the past five years? If yes, provide details.
- During the past seven years, has your firm ever filed for protection under the Federal bankruptcy laws? If yes, provide details.
- Are there any other factors or information that could affect your firm's ability to provide the services being sought about which the City should be aware?

9. Other Information

- How is your firm uniquely qualified to serve our account?
- Feel free to include any other information in your proposal which will help the Town develop an understanding of the capabilities of your firm.

10. Required Attachments

- Affidavits: Non-Collusion Non-Conflict Affidavit and EEO/Affirmative Action Affidavit (attached) Sample Valuation Report
- Fee Proposals: In a separate sealed envelope, Respondents are required to submit a fee proposal in the format provided in Section VIII. Any additional reimbursable costs associated with the performance of these services must be clearly delineated in the fee proposal submitted

IV. METHOD OF SELECTION/CITERIA FOR AWARD

A. METHOD OF SELECTION

The evaluation will be completed by a Selection Committee appointed by the Pension Committee. The members of the Selection Committee shall, individually and collectively, evaluate each properly submitted qualification statement and proposal, and shall select a group of finalists. The Selection Committee may conduct initial interviews. Each finalist will be interviewed by the Pension Committee to determine, all factors considered, the most qualified and capable pension management firm with which to contract. While fee schedules will be discussed and considered during these interviews, fees alone will not drive the committee's decision.

The Pension Committee's recommendation for the most responsive responsible respondent shall be presented to the Board of Selectmen for approval and for final negotiations by the Board of Selectmen designated representatives to finalize the contract(s) in conformance with the Town's requirements and subject to Town approvals and review by the Town attorney. The contract will not be deemed to be awarded until a written contract, in a form acceptable to the Town, has been fully executed by both parties.

The Town reserves the right to reject any or all of the responses, or parts thereof, and/or to waive any informality in any of the responses if such rejection or waiver is deemed in the best interest

of the Town. Neither the Selection Committee, Pension Committee or the Town, nor any of their respective officers, directors, employees or authorized agents, as applicable, shall be liable for any claims or damages resulting from the evaluation, selection, non-selection or rejection of any proposal submitted in response to this Request for Qualifications and Proposals.

B. CRITERIA FOR AWARD

The following factors will be considered, but are not limited to, the following:

1. Accuracy, overall quality, thoroughness and responsiveness to the Town’s requirements as summarized herein;
2. Municipal public sector experience of the firm and the designated account executive and other key personnel to be assigned to the account. .
3. Demonstrated long term consistent successful performance on other municipal and institutional accounts including flexibility, efficiency and timeliness in providing day to day service to municipal clients, implementation of initiatives, and cost saving measures as applicable.
4. Familiarity and experience with the management of investments for municipal and public pension plans along with overall service package.
5. Fee schedule.

V. TIMELINE OF THE RFQ PROCESS

RFQ and separate fee proposal envelope due: March 26, 2019

Selection Committee review and optional interviews of firms: Early April, 2019

Pension Committee interviews of finalists; Late April, 2019

Board of Selectmen award and notice to all firms: Early May, 2019
(subject to successful contract negotiation)

Should any prospective firm be in doubt as to the true meaning of any portion of this RFQ/RFP, or find any ambiguity, inconsistency, or omission therein, the firm shall make a written request for an official interpretation or correction. All inquiries relative to the specifications must be made in writing to Maryjane Malavasi at malavasim@ci.guilford.ct.us with a copy to the Purchasing Department at querciak@ci.guilford.ct.us and millmanp@ci.guilford.ct.us on or before March 18, 2019 by noon.

VI. GENERAL TERMS AND CONDITIONS

A. TERMS AND CONDITIONS

A prospective Respondent must be willing to adhere to the terms and conditions of this request, including the following:

1. Ownership of Documents – All qualification statements submitted in response to this Request for Qualifications and Proposals (RFQ/RFP) are to be the sole property of the Town and subject to the provisions of Section 1-200 et seq. of the Connecticut General Statutes (re: Freedom of Information).
2. Ownership of Subsequent Products – Any product, whether acceptable or unacceptable, developed under a contract awarded as a result of this RFQ/RFP is to be the sole property of the Town and subject to the provision of Section 1-200 et seq. of the Connecticut General Statutes (re: Freedom of Information) unless stated otherwise in the RFQ/RFP or contract.
3. Timing and Sequence – Timing and sequence of events resulting from this RFQ/RFP will ultimately be determined by the Town and the Selection Committee.
4. Oral Agreements – The Selection Committee and the Town will not be responsible for any alleged oral agreement or arrangement made by a respondent with any agency or employee.
5. Amending or Canceling Requests – The Town reserves the right to amend or cancel this RFQ/RFP prior to the due date and time, if it is in the best interest of the Town to do so.
6. Rejection for Default or Misrepresentation – The Town reserves the right to reject the proposal of any Respondent that is in default of any prior contract or for misrepresentation.
7. Clerical Error-The Town reserves the right to correct inaccurate awards resulting from its clerical error.
8. Rejection of Qualification Statements - Qualification statements are subject to rejection in whole or in part if they limit or modify any of the terms and conditions and/or specifications of the RFQ/RFP.
9. Changes to Qualification Statements - No additions or changes to the original qualification statement will be allowed after submittal.
10. Contract Requirements – A formal agreement will be entered into with the Respondent. The contents of the proposal submitted by the successful Respondent and the RFQ/RFP will become part of any contract award.
11. Rights Reserved to the Town – The Town reserves the right to award in part, to reject any and all qualification statements in whole or in part, to waive technical defects, irregularities and omissions if, in its judgment, the best interests of the Town will be served.

12. Withdrawal of Qualification Statements – Negligence on the part of the Respondent in preparing the qualification statement confers no right of withdrawal after the time fixed for the acceptance of the qualification statement.

13. Assigning, Transferring of Agreement – The successful Respondent is prohibited from assigning, transferring, conveying, subletting or otherwise disposing of this agreement, its rights, title or interest therein or its power to execute such agreement by any other person, company, or corporation without the prior consent and approval in writing by the Town.

14. Cost of Preparing Qualification/Proposal Statements – The Town shall not be responsible for any expenses incurred by the organization in preparing and submitting a qualification statement. All qualification statements shall provide a straightforward, concise delineation of the firm's capabilities to satisfy the requirements of this request. Emphasis should be on completeness and clarity of content.

B. INSURANCE REQUIREMENTS –

1. General Requirements.

The awarded Respondent shall be responsible for maintaining insurance coverage in force for the duration of the contract of the kinds and amounts listed below, with an insurance company with an AM Best Rating of A-,VIII or better licensed to write such insurance in the State of Connecticut and acceptable to the Town of Guilford.

The insurer shall provide the Town of Guilford with Certificates of Insurance, on a form acceptable to the Town, signed by an authorized representative of the insurance company prior to the commencement of performance of this contract describing the coverage and providing that the insurer shall give the Town of Guilford written notice of at least thirty (30) days in advance of any termination, expiration, or any and all changes in coverage.

Such insurance or renewals or replacements thereof shall remain in force during the Respondent's responsibility under this contract.

The Respondent, at the Respondent's own cost and expense, shall procure and maintain all insurances required and shall include the Town of Guilford as Additional Insured's on all such insurance, except Workers' Compensation coverage. The Certificate of Insurance shall evidence all required insurances, including Additional Insured and Waivers of Subrogation. The Respondent shall also provide its policy endorsement indicating the Town of Guilford's status as additional insured. Respondent coverage shall be primary.

In order to facilitate this requirement for insurance, it is recommended that the Respondent forward a copy of these requirements to the Respondent's insurance representative(s).

2. Specific Requirements.

a) **Workers' Compensation Insurance.** The awarded Respondent shall carry Workers'

Compensation insurance in accordance with the requirements of the laws of the State of Connecticut, and employer's liability limits of Five Hundred Thousand Dollars (\$500,000.00) coverage for each accident, Five Hundred Thousand Dollars (\$500,000.00) coverage for each employee by disease, Five Hundred Thousand (\$500,000.00) policy limit coverage for disease.

b) Commercial General Liability. With respect to all operations which awarded respondent performs, it shall carry Commercial General Liability insurance providing for a total limit of Two Million Dollars (\$2,000,000.00) coverage per occurrence for each site or project for all damages arising out of bodily injury, personal injury, property damage, products/completed operations, and contractual liability coverage for the indemnification obligations arising under this Agreement. Each annual aggregate limit shall not be less than Five Million Dollars (\$5,000,000.00). The limit may be provided through a combination of primary and umbrella/excess liability policies acceptable to The Town of Guilford. Blanket Contractual Liability for liability assumed under this Agreement and all other Contracts relative to the Project.

c) Automobile Liability. With respect to each owned, non-owned, or hired vehicles, the awarded Respondent shall carry Automobile Liability insurance providing One Million Dollars (\$1,000,000.00).

d) Excess Liability Coverage. With respect to the coverage provided by the awarded Respondent for this Project, excess liability insurance will be provided in an amount not less than Five Million Dollars (\$5,000,000.00) per occurrence and annual aggregate basis.

e) Aggregate Limits. Any aggregate limits must be declared to and be approved by the Town of Guilford. It is agreed that the awarded Respondent shall notify the Town of Guilford whenever fifty percent (50%) of the aggregate limits are eroded during the required coverage period. If the aggregate limit is eroded for the full limit, the Respondent agrees to reinstate or purchase additional limits to meet the minimum limit requirements stated herein. Any premium for such shall be paid by Respondent.

f) Deductibles and Self-Insured Retentions: Any deductible or self-insured retention must be declared to and approved by the Town of Guilford. All deductibles or self-insured retentions are the sole responsibility of the awarded Respondent to pay and/or to indemnify.

The parties agree that the amounts of insurance under this Agreement do not, in any way, limit the Respondent's liability to the Town of Guilford by virtue of this promise to indemnify and hold the Town of Guilford harmless so that in the event of any settlement of a claim or a judgment in an amount in excess of the amount of insurance coverage carried by the awarded Respondent, the Respondent shall be liable to the Town of Guilford for the difference, plus all fees and expenses incurred in collecting same, all at the Respondent's sole cost.

g) Errors and Omissions Insurance. The awarded Respondent shall provide and maintain Errors and Omissions Insurance with minimum limits of \$2,000,000 per occurrence/annual aggregate. The policy shall not have a deductible greater than \$50,000.00. Coverage shall be maintained in effect continuously for a period of at least six (6) years from the date of Final

Payment by Owner to Respondent.

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VII. AFFIDAVITS

NON-COLLUSIVE / NON-CONFLICT AFFIDAVIT OF RESPONDENTS

FOR RFQ/RFP #3-1819 PENSION and OPEB ACTUARIAL SERVICES

The undersigned bidder, having fully informed themselves regarding the accuracy of the statements made herein certifies that:

1. the bid has been arrived at by the bidder independently and has been submitted without collusion with, and without any agreement, understanding, or planned common course of action with any other vendor of materials, supplies, equipment, or services described in the invitation to bid, designed to limit independent bidding or competition;

2. the contents of the bid have not been communicated by the bidder and its employees or agents to any person not an employee or agent of the bidder or its surety on any bond furnished with the bid, and will not be communicated to any such person prior to the official opening of the bid;

3. no Selectman or other officer or employee or person whose salary is payable in whole or in part from the Town of Guilford, nor any immediate family member thereof, is directly or indirectly interested in the Bid/Proposal, or in the supplies, materials, equipment, work or labor to which it relates, or in any profits thereof; and

4. he/she has read the Guilford Code of Ethics, set forth in Chapter 31 of the Code of the Town of Guilford, which is available on the Town website and he/she agrees on his/her behalf and on the behalf of his/her firm/company that he/she nor his/her firm/company are in violation of the Code with respect to this bid.

The undersigned further certifies that this statement is executed for the purpose of inducing the Town of Guilford to consider the bid and make an award in accordance therewith.

Subscribed and sworn to me _____
this _____ day of _____, 20_____.

Legal Name of Bidder: _____

Business Name: _____

Business Address: _____

My Commission Expires _____

Notary Public

_____ Date

AFFIRMATIVE ACTION/EEO AFFIDAVIT

FOR RFQ/RFP #3-1819 PENSION and OPEB ACTUARIAL SERVICES

Concerning Equal Employment Opportunities and/or Affirmative Action Policy

I/we, the respondent, certify to the TOWN OF GUILFORD that:

1. I/we are in compliance with the equal opportunity clause as set forth in Connecticut state law (Executive Order No. Three, <http://www.cslib.org/exeorder3.htm>).
2. I/we do not maintain segregated facilities.
3. I/we have filed all required employer's information reports.
4. I/we have developed and maintain written affirmative action programs.
5. I/we list job openings with federal and state employment services.
6. I/we attempt to employ and advance in employment qualified handicapped individuals.
7. I/we are in compliance with the Americans with Disabilities Act.
8. I/we (check one)
_____ have an Affirmative Action Program, or
_____ employ 10 people or fewer

Legal Name of Bidder

(Signature)

Bidder's Representative, Duly Authorized _____

Name of Bidder's Authorized Representative _____

Title of Bidder's Authorized Representative _____

Subscribed and sworn to me _____
this _____ day of _____, 20____.

Notary Public

My Commission Expires _____
Date

VIII. FEE PROPOSAL FORM

RFQ/RFP #3-1819 PENSION and OPEB ACTUARIAL SERVICES

RFQ/RFP DUE Tuesday, March 26, 2019 at 2:00 p.m.

**Board of Selectmen
Town of Guilford
Second Floor of Town Hall
31 Park Street
Guilford, CT 06437
Attention: Purchasing Department**

BIDDER

Company Name: _____

Address: _____

Telephone: _____ Fax: _____

E-mail: _____

Contact Person: _____ Title: _____

To the Board of Selectmen:

We submit for your consideration our RFQ/RFP #3-1819. We have read the RFQ/RFP documents and are submitting our bid in full compliance with all terms and conditions except as noted below under "Exceptions." *We acknowledge receipt of all addendums to the bid documents and assume full responsibility to access those addendums from the Town website and/or DAS website, as applicable.*

Upon notification of the award, we will provide the following within five (5) business days after receipt of such notice:

(i) the requested Certificate of Insurance from the following company:

_____; and

(ii) two original contracts, in a form provided by the Town, executed by authorized officer of awarded Respondent.

FEE PROPOSAL FORM CONTINUED

RFQ/RFP #3-1819 PENSION and OPEB ACTUARIAL SERVICES

1. Please indicate your fee schedule for defined benefit pension plan valuations, defined benefit pension plan GASB disclosure reports, OPEB plan valuations, OPEB plan GASB disclosure, hourly rates for other services
2. Would you charge separately for travel expenses? If so, explain in detail your policy.
3. What other costs or expenses might we incur with your firm?
4. Please describe how you determine consulting fees due, how such payments are made and the periodicity thereof.

Exceptions: _____

The undersigned authorized representative hereby submits the above RFQ/RFP to the Town of Guilford.

Name of Contractor Entity: _____

By _____

Print Name and Title: _____

Duly authorized

