**Consulting Services ITQ**

**Request for Quote**

**Technical Submittal**

1. **Statement of the Project.** [Agency will to provide detailed narrative of the project]
2. **Term of the Project.** The term of this Project shall commence upon issuance of a Contract or Purchase Order to the selected Contractor (“Effective Date”), and shall expire [specify number of years/months] after the Effective Date, unless it is terminated earlier pursuant to the terms of the Contract or Purchase Order. The term of this Project may be extended by and at the sole option of the Commonwealth for up to 90 days upon the same terms and conditions where a continued needed exists for the services of the selected Contractor and there has been no termination under the terms of the Contract or Purchase Order.
3. **Qualifications**.
4. **Requirements.** In response to this RFQ, contractor is required to upload all relative licensures, accreditations, narratives etc., specified below, under Buyer Attachments located in the JAGGAER. [Agency can build upon this criteria]

**If any of the following commodity codes are chosen for this RFQ, Agency must include in this RFQ the requirements indicated for the specific commodity code; otherwise delete the below information:**

1. **Actuarial Services Healthcare/Medical AREA 1**

* **All actuaries shall be enrolled actuaries and shall be members of the American Academy of Actuaries or the Society of Actuaries.**

1. **Actuarial Services Healthcare/Medical AREA 2**

* **Suppliers must show the experience, staffing, and technology to perform actuarial services for a health care plan, investment plans, financial or similar services that will have annual expenditures in excess of $1,000,000,000 (billion).**
* **The individual assigned as lead consultant(s) must have a minimum of seven years of professional experience in the actuarial consultant field. All actuaries shall be enrolled actuaries and shall be members of the American Academy of Actuaries or the Society of Actuaries.**

1. **Actuarial Services Medical Professional Liability AREA 2**

* **Actuarial supplier must show the experience, staffing, and technology to perform actuarial services for a Pennsylvania medical professional liability special fund that has projected financial obligations in excess of $1,000,000,000 (billion).**
* **The lead consultant(s) shall be a fellow of the Casualty Actuary Society. Suppliers must have the ability to interact with personnel at all levels of government, and possess strong communication skills to effectively communicate and disseminate information to government officials or the public. Suppliers must have extensive knowledge of Pennsylvania medical malpractice liability market including the laws and regulations governing Mcare.**
* **Suppliers and professionals all must be free from conflicts of interest and criminal records related to services provided. Suppliers must describe in detail any oversight by federal/state regulatory authorities. The Supplier must indicate whether the Supplier is personally or professionally bonded or insured.**

1. **Actuarial Services - Actuarial Consultant Pensions/Investment Area 1**

* **All actuaries shall be enrolled actuaries and shall be members of the American Academy of Actuaries or the Society of Actuaries.**

1. **Actuarial Services - Actuarial Consultant Pensions/Investment Area 2**

* **Suppliers must show the experience, staffing, and technology to perform actuarial services for a health care plan, investment plans, financial or similar services that will have annual expenditures in excess of $1,000,000,000 (billion).**
* **All actuaries shall be enrolled actuaries and shall be members of the American Academy of Actuaries or the Society of Actuaries.**

1. **Actuarial Services - Actuarial Consultant Financial Area 1**

* **All actuaries shall be enrolled actuaries and shall be members of the American Academy of Actuaries or the Society of Actuaries.**

1. **Actuarial Services - Actuarial Consultant Financial Area 2**

* **Suppliers must show the experience, staffing, and technology to perform actuarial services for a health care plan, investment plans, financial or similar services that will have annual expenditures in excess of $1,000,000,000 (billion).**
* **All actuaries shall be enrolled actuaries and shall be members of the American Academy of Actuaries or the Society of Actuaries.**

1. **Technical Assistance-Federal Grant or Loan Programs**

* **Documentation showing a working knowledge and understanding of federal regulations, including, but not limited to:**

1. **Environmental Requirements**
2. **Federal Labor Standards**
3. **Uniform Administrative Requirements**
4. **Uniform Relocation Act**
5. **Financial Management Systems**

1. **Technical Assistance-State Grant or Loan Programs**

* **Documentation showing a working knowledge and understanding of state regulations and guidelines related to state grant or loan programs.**

1. **Healthcare Services- Innovation Strategies**

* **The Contractor must provide documentation showing a minimum of two (2) years of experience in business working with the insurers, health systems, health care providers and related state government agencies in Pennsylvania.**
* **A minimum of two (2) years of experience in business working with local multi-stakeholder coalitions and national and regional health care organizations.**
* **The Contractor must provide documentation showing extensive knowledge of Pennsylvania’s Chronic Care Initiative.**

1. **Educational Consulting Services – Business/Finance Area 2**

* **Documented experience managing a multi-faceted team that can cover the many disparate elements of school finance - educational services, workforce costs, transportation, maintenance, food service, capital, security and others.**
* **Minimum of two (2) years of experience working with local multi-stakeholder coalitions and national and regional educational organizations.**
* **Specific experience with school/municipal bond financing, workforce consulting (including labor relations), public private partnerships, and multi-year fiscal recovery planning.**
* **Individuals assigned must have applicable qualifications for the above including advanced degree(s) in business leadership and/or professional certification(s).**

1. **Educational Consulting Services- Student Achievement**

* **Provide a narrative in 250 words or less that includes the following:**

1. **Describe your experience with professional speaking engagements and publications;**
2. **Describe an increase in student achievement within a given assignment;**
3. **Provide examples where you had to collect, analyze and present information to peers; and**
4. **List programs in Microsoft Office you currently use and years of experience with them.**
5. **Real Estate Planning Services**

* **Provide certificates of all Certified Land Use Planners from the American Institute of Certified Planners (AICP), or be a Licensed Landscape Architect and provide supporting Certificate.**

1. **Experience.** Contractor must provide three (3) detailed examples of projects that your company performed that are similar in nature and scope to the services stated in this RFQ. Contractor should provide a detailed narrative that includes the following:

A. Project Name;

B. Scope and Size of Project;

C. Project Start and End Dates;

D. Company Name;

E. Company Address;

F. Contact Person;

G. Contact Phone Number; and

H. Contact Email Address.

**Contractor Response**

1. **Personnel.** Contractor must provide the names and resumes of the individuals who will be assigned to this project showing a minimum of two (2) years of experience and demonstrating the qualifications and skills required to successfully develop and implement the project. It is very important that the proposed individuals have all proper and current certifications. The proposed project manager must have demonstrated project management skills and technical background and experience to appropriately manage the project. Ensure resumes contain no personal information as these may become public documents. [Agencies can build upon this criteria]

**Contractor Response**

1. **Subcontracting.** If applicable, Contractor shall provide a subcontracting plan for all subcontractors, including small and small diverse business subcontractors, who will be assigned to the Project. Subcontractors, under this RFQ, do not need to be a qualified ITQ Contractor since the prime contractor assumes responsibility for all services whether or not it provides them directly. A Contractor cannot sub-contract more than 49% of the services. Upon award of the contract resulting from this RFQ, subcontractors included in the quote submission are deemed approved. For each position to be subcontracted provide:
2. Name of subcontractor;
3. Primary contact name and email;
4. Address of subcontractor;
5. Description of services to be performed;
6. Number of employees by job category assigned to this project; and
7. Resumes (if appropriate and available).

**Contractor Response**

1. **Project Work Plan.** Contractor will be responsible for performing the following tasks. Contractor shall describe in narrative form its approach for accomplishing the tasks.

[Agencies shall list the tasks associated with the project]

**Contractor Response**

1. **Funds Commitment.** [Agencies shall remove if not applicable]

In the event an agency receives approval to make payment for services via a Funds Commitment rather than an agency PO, all references to “purchase order” or “purchase orders” in the CONTRACT TERMS and CONDITIONS shall be replaced with the term “Contract.” A formal written notice to proceed issued by the agency will constitute the Contractor’s authority to make delivery, and shall evidence the existence of an executed contract.