

## NOTICE OF REQUEST FOR STATEMENTS OF QUALIFICATIONS

The Humboldt County Office of Education is requesting qualifications until 4:00 p.m. on June 14, 2019, for Actuarial Study of Retiree Health Liabilities for the Humboldt County Office of Education. Only proposals that are in strict conformance with the instructions included in the Request for Statements of Qualifications will be considered. Copies of the Request for Statements of Qualifications are available at the Humboldt County Office of Education, 901 Myrtle Ave., Eureka, CA 95501 and via HCOE's website: <https://hcoe.org/bids/> . Inquiries may be directed to Corey Weber, Director of Fiscal Services, (707) 445-7030, [cweber@hcoe.org](mailto:cweber@hcoe.org).

**Humboldt County Office of Education**

**REQUEST FOR STATEMENTS OF QUALIFICATIONS FOR  
ACTUARIAL STUDY OF RETIREE HEALTH LIABILITIES**

**Humboldt County Office of Education**

**901 Myrtle Ave.**

**Eureka, CA 95501**

**RFQ Issued: May 30, 2019**

**Statement Due: June 14, 2019**

## **REQUEST FOR STATEMENTS OF QUALIFICATIONS FOR ACTUARIAL STUDY OF RETIREE HEALTH LIABILITIES**

### **INTRODUCTION**

The Humboldt County Office of Education (HCOE) is issuing this Request for Statements of Qualifications (RFQ) from qualified firms for Actuarial Study of Retiree Health Liabilities related to HCOE (Project). The purpose of this request is to engage the services of a qualified consulting firm to calculate HCOE's actuarial computations for the proper valuation and reporting of GASB 75.

This RFQ describes the required scope of work, the selection process and the minimum information that must be included in the proposal. Failure to submit information in accordance with this RFQ's requirements and procedures may be cause for disqualification.

### **SUBMITTAL**

Sealed statements for the Project must be received no later than **4:00 p.m., June 14, 2019**, at **Humboldt County Office of Education, 901 Myrtle Ave., Eureka, CA 95501 ATTN: Corey Weber, Director of Fiscal Services, via email at [cweber@hcoe.org](mailto:cweber@hcoe.org), or by fax to 707-445-7143**. Proposals may be mailed, emailed, or submitted in person.

### **SCOPE OF WORK**

Provide the Humboldt County Office of Education with actuarial report for Fiscal Year ending June 30, 2019, setting forth all liabilities of the postretirement health benefit program, including a projection of expenditures under the plan. The report should contain the following information:

- Disclosure of the postretirement benefit obligations in accordance with the Statement No. 75 of the Governmental Accounting Standards Board for the fiscal year beginning July 1, 2018;
- Recommended level annual funding amounts, to pre-fund the obligations as a percent of covered employee payroll;
- Reconciliation of Total OPEB Liability with the prior actuarial report;
- Full valuation of the Net OPEB Liability as of June 30, 2019, and Roll-forward of Net OPEB Liability to June 30, 2020;
- Summary of plan provisions, actuarial assumptions, and certification

In addition to the report, provide ongoing assistance in the preparation or review of GASB 75 (OPEB) footnote disclosures at the time the District prepares its financial statements. Multi-year contract options will be considered.

## **BASIS OF AWARD**

Awards resulting from this solicitation will be made to one and only one consultant. HCOE reserves the right to reject any and/or all proposals and to accept or reject any one or more items of the proposal.

Each responsive proposal will be evaluated individually based on the below scoring categories. The firm with the highest ranked proposal will be considered the *Apparent Winning Proposal* and will enter into final negotiations on the contract, subject to possible interview by HCOE staff. A score that falls within a *“Does not meet established criteria”* range, may lead to disqualification.

Should HCOE and the consultant with the Apparent Winning Proposal not be able to come to agreement on the contract, HCOE reserves the right to enter into contract negotiations with the firm with the second highest ranked proposal, or formally terminate negotiations with the entity or entities.

HCOE reserves the right to award the Project to the entity HCOE deems most suitable to undertake the Project. HCOE further reserves the right to reject any and all proposals or waive any irregularities in any of the proposals submitted pursuant to this RFQ.

### **Scoring Categories:**

#### **1. Experience and Qualifications (40 points possible):**

Proposers must provide up to three profiles of each project which illustrates the experience of the consultant. Consideration will only be given to projects comparable in scope and complexity. To be considered, a current project should be at least substantially complete.

Project profiles should include:

- Owner’s name, location of the project and scope of work.
- The consultant’s responsibility on the project.
- Owner’s project representative’s name, address, and phone number.
- Type and size of project.
- Project commencement and completion.
- If available, letters of recommendation.

Points will be awarded as follows, based on the proposer’s ability to demonstrate their related project experience, qualifications, and availability:

<i>Does not meet established criteria</i>	<i>0 to 15 points</i>
<i>Meets established criteria</i>	<i>16 to 30 points</i>
<i>Exceeds established criteria</i>	<i>31 to 40 points</i>

**2. Proposed Approach (30 points possible):**

Submit the processes used to achieve the timely completion of work outlined in the Scope of Work. The consultant must clearly identify the processes and methods to be used for scheduling in order to meet project schedule and proposed budget.

Points will be awarded as follows, based on the consultant’s proposed approach:

<i>Does not meet established criteria</i>	<i>0 to 10 points</i>
<i>Meets established criteria</i>	<i>11 to 20 points</i>
<i>Exceeds established criteria</i>	<i>21 to 30 points</i>

**3. Schedule/Timeline (30 points possible):**

Submit the schedule/timeline of work to complete the Scope of Work. The consultant must clearly identify key milestones and risks in meeting these milestones.

Points will be awarded as follows based on the consultant’s analysis, presentation of the proposed timeline, and proposed completion dates. Preference will be given to earlier completion dates.

<i>Does not meet established criteria</i>	<i>0 to 10 points</i>
<i>Meets established criteria</i>	<i>11 to 20 points</i>
<i>Exceeds established criteria</i>	<i>21 to 30 points</i>

**4. Project Costs (50 points possible):**

The consultant must provide itemized costs and totals for completion of each portion detailed in the Scope of Work. HCOE reserves the right to reject any proposal which, in its opinion when compared to other proposals received or to HCOE’s internal estimates, does not accurately reflect the cost to perform the Scope of Work. The District may reject as non-responsive any bid which unevenly weights or allocates costs, including but not limited to overhead and profit to one or more particular items.

Payment will be processed upon 100% completion of the project.

The lowest total cost proposal will receive 50 points. Other (higher) cost proposals will be awarded points as follows:

$$\text{Lowest Cost Proposal} / \text{Other Cost Proposal} \times 50 \text{ points}$$

**INSTRUCTIONS TO PROPOSERS**

In addition to responding to each of the items described in the Scoring Categories, each responsive proposal must include certification by the proposer acknowledging the following:

- Quotations shall include all applicable taxes and fees. No miscellaneous charges will be allowed. HCOE is not responsible for service charges, travel costs, fuel surcharges, or any other miscellaneous fees over and above the prices quoted on the bid.

**ANTICIPATED SCHEDULE (Dates Subject to Change)**

RFQ Issued	May 30, 2019
RFQ Submittal Deadline	June 14, 2019
Notice to Apparent Winner	June 17-21, 2019
Project Completion	July 31, 2019, or earlier

**GENERAL INFORMATION**

1. **Amendments:** HCOE reserves the right to cancel or revise this RFQ in part or in its entirety. If HCOE cancels or revises the RFQ, all Respondents will be notified by addenda. HCOE also reserves the right to extend the date responses are due, or postpone any interview date(s).

2. **Inquiries:** Any questions concerning this RFQ or selection process may be directed to:

Corey Weber, Director of Fiscal Services, Humboldt County Office of Education  
901 Myrtle Ave., Eureka, CA 95501  
Telephone: (707) 445-7030; Email: cweber@hcoe.org

Replies involving any substantive issues will be issued by addenda and mailed to all parties recorded by HCOE as having received the RFQ documents. Only questions answered by formal written addenda will be binding.

3. **Non-Discrimination:** HCOE does not discriminate on the basis of race, color, national origin, religion, age, ancestry, medical condition, disability, or gender in consideration for an award of contract.

4. **Costs:** Costs of preparing a proposal in response to this RFQ are solely the responsibility of the applicant.

5. **Limitations:** This RFQ does not commit HCOE to award a contract, to defray any costs incurred in the preparation of a proposal pursuant to the RFQ, or to procure or contract for work. HCOE reserves the right to waive any irregularities in the proposals received pursuant to this RFQ, or in the process outlined herein for selection of a Consultant for the Project.

SCORING RUBRIC

Company			
#1 up to 40 points - <b><u>Experience and Qualifications</u></b>			
#2 up to 30 points - <b><u>Proposed Approach</u></b>			
#3 up to 30 points - <b><u>Schedule/Timeline</u></b>			
#4 up to 50 points - <b><u>Project Costs</u></b>			
Total Points			