

Office of Legislative Research and General Counsel

Request For Proposals

Actuarial Consultant to Health System Reform Task Force *April 22, 2008*

GENERAL INFORMATION

Purpose of Request for Proposals (RFP)

The purpose of this RFP is to enter into a contract with a qualified person, persons, or entity to assist the Office of Legislative Research and General Counsel (OLRGC) in providing staff support to the Utah Legislature's Health System Reform Task Force by evaluating the actuarial impact of health insurance market reform developed by the Task Force.

General Contract Information

It is anticipated that this RFP will result in a single contract award and will be in effect from May 2008 until December 2008. The contract amount, the terms of payment, the specific length of the contract, and any other relevant terms will be negotiated between the Office of Legislative Research and General Counsel or its designee and the successful offeror.

Proposal Specifications

The consultant shall:

- (1) identify, for each person who will perform work for the task force,:
 - (a) the particular qualifications of the person;
 - (b) the function of the person;
 - (c) the hourly rate for the person; and
 - (d) any potential conflicts of interest;
- (2) demonstrate that benefit values and other aspects of work described in part (3) of the proposal specifications shall be based on Utah demographics and patterns of use;
- (3) provide the following services to the Health System Reform Task Force:

- (a) review reports and other materials produced by the Task Force and submitted to the consultant by OLRGC;
- (b) consult with OLRGC on matters studied by the Task Force, including:
 - (i) the cost of different health benefit plans and potential barriers to access to coverage resulting from the cost;
 - (ii) risk adjustment payments or mechanisms among health plans and within health plans;
 - (iii) the costs of subsidies for different levels of health benefit plans; and
 - (iv) other health system reform proposals prepared by the Task Force and submitted to the consultant by OLRGC; and
- (4) communicate in writing and by telephone with the Task Force or OLRGC on matters studied by the Task Force.

INFORMATION ABOUT CREATING, FORMATTING, SUBMITTING, AND REVISING A PROPOSAL

Issuing Office

The State of Utah's Office of Legislative Research and General Counsel is the issuing office for this document and all subsequent addenda relating to it, on behalf of the Task Force. Inquiries about this RFP should be directed to:

Catherine J. Dupont, Associate General Counsel
Office of Legislative Research and General Counsel
Email: cdupont@utah.gov
Telephone: (801) 538-1032
Fax: (801) 538-1712

Submitting Your Proposal

Primary Requirement:

The offeror's written response to this RFP will be the primary source of information used in the evaluation process. Therefore, each offeror is requested and advised to be as complete as possible in its written response.

Number and Deadlines:

Ten written copies of the proposal and one electronic copy must be received at the following address on or before **May 23, 2008, 5:00 p.m. Mountain Daylight Time:**

Office of Legislative Research and General Counsel
Utah State Capitol Complex
W210 House Building
P.O. Box 145210
Salt Lake City, Utah 84114-5210

Attention: Catherine J. Dupont

Proposals received after that date and time will not be considered.

Restrictions on Publicity:

The successful offeror may not make any announcement about the award of the contract as a result of this RFP without the prior written approval of the Task Force or its designee. Except as specifically authorized in the contract, the successful offeror may not use any data, pictures, or other representation of the Utah Legislature in its external advertising, marketing programs, or other promotional efforts.

Organization of Proposal

Offeror Information Page

The first page of the proposal must include the following information in the following form:

Offeror Summary Information

Name:

Contact person:

Address:

Telephone:

Fax:

Federal Tax ID#:

Email:

Description of Organization of the Offeror

Describe your organization, including organizational structure, age of the organization, location of offices, web site, experience, financial stability, and qualifications of key personnel to be assigned to the project.

List of Owners

Provide a complete list of owners of the offeror's organization.

Current references

List a minimum of five references, including the name of a contact person, name of organization, address, and telephone number.

All proposals must be organized and tabbed with labels for the following headings:

Executive Summary: A one to two-page executive summary should briefly describe the offeror's proposal and highlight the major features of the proposal. Persons reviewing the proposal should be able to determine the essence of the proposal by reading the executive summary. Proprietary information requests should be identified in this section.

Detailed Response: This section should constitute the major portion of the proposal and must contain at least the following information:

1. A complete narrative of the offeror's assessment of the work to be performed, the offeror's expertise and proposed methodology, and the resources necessary to fulfill the requirements.
2. The offeror's understanding of the desired overall performance expectations. Any proposed options or alternatives should be clearly indicated.
3. The offeror's budget or professional fees for the services.

Other Requirements: The offeror's name must appear on each page of the proposal. Any erasures, cross-outs, alterations, or other changes must be initialed by the person signing the proposal.

The person signing the proposal must be authorized to commit the offeror and to conduct negotiations or discussions if requested or required, or both.

Modifications to the Proposal after Submission

The offeror may modify a proposal at any time, in written form, before the closing date listed in this RFP. A proposal may be withdrawn at any time before the award of the contract upon receipt of written notice by the Office of Legislative Research and General Counsel.

General Powers of the Office of Legislative Research and General Counsel

The Office of Legislative Research and General Counsel reserves the right to reject any or all proposals, to waive any informalities or minor irregularities, or both, and to make the award in the best interest of the Task Force, with or without further discussion or negotiations. Proposals may be reviewed and evaluated by any person at the discretion of the Office of Legislative Research and General Counsel. All materials submitted become the property of the Office of Legislative Research and General Counsel and the Task Force and may be

returned only at the option of the Task Force.

Clarification of Proposal/Research about Offeror

The Office of Legislative Research or its designee may contact any offeror to clarify any response, contact any current users of the offeror's services, solicit information from any available source concerning any aspect of the proposal, and seek and review any other information it deems relevant to the evaluation process.

Discussions with Offerors (Oral Presentation)

The Office of Legislative Research or its designee may award a contract based on the initial proposals received without discussion with the offeror.

Protecting Proprietary Information

The proposal of an offeror becomes public information. Certain commercial information (such as nonpublic financial information) may be protected if the information qualifies for protection under Utah Code Ann. §63-2-304. Pricing and service elements are not considered proprietary. An entire proposal may not be marked as proprietary. Offerors must clearly identify in the executive summary and mark in the body of the proposal any specific information that they are requesting be classified as "protected." The executive summary must contain specific justification explaining why the information should be protected. The Task Force will determine whether or not to classify information identified as proprietary as "protected" under Utah Code Ann. §63-2-304 and will inform the offeror of its decision.