

## CITY OF RICHMOND CONTRACT AMENDMENT

<b>Department:</b> Finance	<b>Project Manager:</b> Delmy Cuellar
<b>Project Manager E-mail:</b> Delmy_Cuellar@ci.richmond.ca.us	<b>Project Manager Phone No:</b> (510) 620-6790
<b>P.R. No:</b> <b>Vendor No:</b> 11235	<b>P.O./Contract No:</b> 5641
<b>Description of Services:</b> Actuarial Valuation services for closed Pension Plans and Post Retirement Medical program.	
<b>Amendment No. <u>1</u> modifies the: (2<sup>nd</sup> or subsequent amendments attach Amendment History page)</b> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="checkbox"/> <b>Term, Payment Limit and Service Plan</b>  <input type="checkbox"/> <b>Term and Service Plan</b> </div> <div style="width: 45%;"> <input checked="" type="checkbox"/> <b>Payment Limit and Service Plan</b>  <input type="checkbox"/> <b>Service Plan</b> </div> </div>	

The parties to this Contract Amendment do mutually agree and promise as follows:

1. Parties. The parties to this Contract Amendment are the City of Richmond, California, a municipal corporation (City), and the following named Contractor:

Northern Consulting Actuaries, Inc. DBA Van Iwaarden Assoc.

Company Name: \_\_\_\_\_

Street Address: 100 South 5th Street, Suite 1900

City, State, Zip Code: Minneapolis, MN 55402-1010

Contact Person: Mark Schulte

Telephone: (612) 596-5971

Email: MarkS@vaniwaarden.com

Business License No: 40050565 / Expiration Date: August 10, 2022

A California ☒ corporation, ☐ limited liability corporation ☐ general partnership, ☐ limited partnership, ☐ individual, ☐ non-profit corporation,  
☐ individual dba as [specify:] \_\_\_\_\_  
☐ other [specify:] \_\_\_\_\_

2. Purpose. This Contract Amendment is being entered into to amend the Contract between City and Contractor which was approved by the City Council of the City of Richmond or executed by the City Manager on June 15, 2021, which **original** term commenced on July 1, 2021 and terminates June 30, 2022 with an **original** contract payment limit of \$26,000.00. Said contract shall hereinafter be referred to as the "Original Contract" and is incorporated herein by reference.

3. Original Contract Provisions. The parties hereto agree to continue to abide by those terms and conditions of the Original Contract, and any amendments thereto, which are unaffected by this Contract Amendment.

4. Amendment Provisions. This Contract Amendment is subject to the Amendment Provisions attached hereto, which are incorporated herein by reference, and which control over any conflicting provisions of the Original Contract, or any amendment thereto.

5. City of Richmond Business License Active Status Maintained. Pursuant to Municipal Code Section 7.04.030, the Contractor must maintain its City of Richmond business license for this Contract Amendment to be deemed to be in effect.

6. Insurance Coverage Updated and Maintained. Pursuant to the Original Contract, the Contractor shall provide the City with updated insurance certificates, and the Contractor shall maintain insurance coverage, for this Contract Amendment to be deemed to be in effect.

7. Signatures. These signatures attest the parties' agreement hereto:

CITY OF RICHMOND, CALIFORNIA  
a municipal corporation

By DocuSigned by: Shasa Curl DS BB  
041871240BD14EC...

Title:

I hereby certify that the Original Contract and this Amendment have been approved by the City Council or executed by the City Manager.

By DocuSigned by: Pamela Christian  
C6643BFF4A43406  
City Clerk

Approved as to form:

By DocuSigned by: JA For  
0F098C4E4C60485...  
City Attorney

List of Attachments:

1. Amendment Provisions
2. Updated Insurance Certificates

CONTRACTOR:

Northern Consulting Actuaries, Inc. DBA Van Iwaarden Assoc.

(\*The Corporation Chairperson of the Board, President or Vice-President should sign on the line below.)

By DocuSigned by: Mark Schulte  
64C8DC3DF0BD4A8...

Title: President

(\*The Corporation Chief Financial Officer, Secretary or Assistant Secretary should sign on the line below.)

By DocuSigned by: Mark Schulte  
64C8DC3DF0BD4A8...

Title: President

(NOTE: Pursuant to California Corporations Code Section 313, if Contractor is a corporation or nonprofit organization, this Contract (1) should be signed by the Chairperson of the Board, President or Vice-President and the Chief Financial Officer, Secretary or Assistant Secretary; (2) should have both signatures conform to designated representative groups pursuant to Corporations Code Section 313.

Contract Amendment between the City of Richmond and  
Northern Consulting Actuaries, Inc. DBA Van Iwaarden Assoc.

Amendment No.

**1**

P.O./Contract No.

**5641**

**AMENDMENT PROVISIONS (PAYMENT LIMIT AND SERVICE PLAN)**

1. Paragraph 3 (Payment Limit) of the Original Contract is hereby amended to increase the payment limit by **\$8,000.00**. Paragraph 3 of the Original Contract is amended to read as follows:

"3. Payment Limit. City's total payments to Contractor under this Contract Amendment shall not exceed **\$34,000.00** including expenses."

"The City of Richmond shall not pay for services that exceed the Contract Payment Limit without the prior written approval of the City Manager if the total Contract amount does not exceed \$10,000 or without the prior approval of the City Council if the total Contract amount is over \$10,000."

2. The Service Plan (Exhibit A) of the Original Contract is hereby amended to include the following tasks and/or services:

- Prepare FY2021 Pension Tax Override Funding Limitation Exhibit.
- Prepare FY2022 Pension Tax Override Funding Limitation Exhibit.
- Ad-Hoc consulting services.

## City of Richmond - Insurance Requirements - Type 2: Professional Services

In all instances where CONTRACTOR or its representatives will provide professional services (*architects, engineers, construction management, counselors, medical professionals, hospitals, clinics, attorneys, consultants, accountants, etc.*) to the City of Richmond (City), the City requires the following MINIMUM insurance requirements and limits.

CONTRACTOR shall procure and maintain for the duration of the contract, agreement, or other order for work, services or supplies, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder and the results of that work by the CONTRACTOR, its agents, representatives, employees or subcontractors. **Maintenance of proper insurance coverage is a material element of the contract. Failure to maintain or renew coverage or to provide evidence of renewal may be treated by the City as a material breach of contract.**

CONTRACTOR agrees that in the event of loss due to any of the perils for which it has agreed to provide Commercial General Liability insurance, CONTRACTOR shall look solely to its insurance for recovery. CONTRACTOR hereby grants to CITY, on behalf of any insurer providing Commercial General Liability insurance to either CONTRACTOR or CITY with respect to the services of CONSULTANT herein, a waiver of any right to subrogation which any such insurer of said CONTRACTOR may acquire against the CITY by virtue of the payment of any loss under such insurance.

Original, signed certificates and original, separate policy endorsements, naming the City as an additional insured for general liability coverage, as well as a waiver of subrogation for Workers' Compensation insurance, shall be received and approved by the City **before any work may begin**. However, failure to do so shall not operate as a waiver of these insurance requirements.

City reserves the right to modify or require additional coverages for specific risk exposures depending on scope of CONTRACTORS work.

Minimum coverage is detailed below. The policy limits of coverage shall be made available to the full limits of the policy. The minimum limits stated herein shall not serve to reduce the policy limits of coverage of CONTRACTOR.

**Minimum Scope of Insurance** – the following forms shall be provided and coverage shall be at least as broad as the following:

1. Insurance Services Office Commercial General Liability coverage (ISO Occurrence Form CG 0001), and including coverage for bodily and personal injury, property damage, and products and completed operations (if applicable).
2. Insurance Services Office Automobile Liability coverage (ISO Form CA 0001, Code 1, Any Auto).
3. Original and Separate Additional Insured Endorsement for General Liability (ISO Form CG 20 10 11/85 or its equivalent) with primary and non-contributory language.
4. Workers' Compensation Insurance as required by the State of California including Employer's Liability coverage.
5. Original and Separate Waiver of Subrogation for Workers' Compensation insurance.
6. Professional Liability or Errors & Omissions Liability Insurance appropriate to the CONTRACTOR's profession (if required.)

Required Coverage	Minimum Limits
Workers' Compensation and Employers' Liability	Statutory limits as required by the State of California including \$1 million Employers' Liability per accident, per employee for bodily injury or disease. If CONTRACTOR is self-insured, provide a certificate of Permission to Self-Insure, signed by the California Department of Industrial Relations and Self-Insurance. If contractor is a sole proprietor (has no employees) than contractor must sign "Contractor Release of Liability" found at: <a href="http://www.ci.richmond.ca.us/index.aspx?nid=61">http://www.ci.richmond.ca.us/index.aspx?nid=61</a> .
General Liability (primary and excess limits combined)	<b>\$2,000,000</b> per occurrence for bodily injury, personal injury and property damage. If the policy includes a general aggregate, either the general aggregate shall apply separately to this project, service or location or the minimum required aggregate limit shall be twice the per occurrence limit. Policy shall be endorsed to name the City of Richmond as an additional insured per the conditions detailed below.

## City of Richmond - Insurance Requirements - Type 2: Professional Services

Automobile Liability	\$1,000,000 per occurrence for bodily injury and property damage.	
Professional Liability or Errors & Omissions Liability – <i>Required for all professionals including architects, engineers, consultants, construction management, counselors, medical professionals, hospitals, clinics, attorneys and accountants, &amp; other consultants as may be required by the City.</i>	<b>PROJECT COST</b>	<b>REQUIRED LIMIT</b>
	\$0 - \$1 million	\$1 million p/o
	\$1 million - \$5 million	\$2 million p/o
	Over \$5 million	\$5 million p/o

Required Policy Conditions	
Additional Insured Endorsement	<p>Applicable to General Liability coverage.</p> <p>The City of Richmond, its officers, officials, employees, agents and volunteers are to be named as additional insureds for all liability arising out of the operations by or on behalf of the named insured including bodily injury, deaths and property damage or destruction arising in any respect directly or indirectly in the performance of this contract.</p> <p><b><i>ISO form CG 20 10 (11/85) or its equivalent is required. If the Contractor is supplying their product or providing a service then the endorsement <u>must not</u> exclude products and completed operations coverage. If it does, then CG 20 37 (10/01) is also required. SAMPLE Endorsements can be found at <a href="http://www.ci.richmond.ca.us/index.aspx?nid=61">http://www.ci.richmond.ca.us/index.aspx?nid=61</a>.</i></b></p>
Primary and Noncontributory	<p>The contractor's insurance coverage must be primary coverage as it pertains to the City, its officers, officials, employees, agents and volunteers. Any insurance or self insurance maintained by the City is wholly separate from the insurance of the contractor and in no way relieves the contractor from its responsibility to provide insurance.</p>
Waiver of Subrogation Endorsement Form	<p>Contractor's insurer will provide a Waiver of Subrogation in favor of the City for Workers' Compensation Insurance during the life of this contract. SAMPLE Endorsements can be found at <a href="http://www.ci.richmond.ca.us/index.aspx?nid=61">http://www.ci.richmond.ca.us/index.aspx?nid=61</a>.</p>
Deductibles and Self-Insured Retentions	<p>Any deductible or self-insured retention must be declared to and approved by the City. At the option of the City either the insurer shall reduce or eliminate such deductibles or self-insured retention as respects the City or the CONTRACTOR shall procure a financial guarantee in an amount equal to the deductible or self-insured retention guaranteeing payment of losses and related investigations, claims administration and defense expenses.</p> <p>Contractor is responsible for satisfaction of the deductible and/or self-insured retention for each loss.</p>
A. M. Best Rating	<p>A: VII or Better. If the A.M. Best Rating falls below the required rating, CONTRACTOR must replace coverage immediately and provide notice to City.</p>

### Umbrella/Excess Liability Policies

If an Umbrella or Excess Liability Policy is used to meet the liability limits, coverage shall be as broad as specified for underlying coverage's and cover those insured in the underlying policies.

### Claims-Made Policies

## **City of Richmond - Insurance Requirements - Type 2: Professional Services**

If any insurance policy is written on a claims-made form: 1) the retroactive date must be shown, and must be before the date of the contract or the beginning of contract work. 2) Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of the contract of work. 3) If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a retroactive date prior to the contract effective date, the Contractor must purchase an extended period coverage for a minimum of five (5) years after completion of contract work.

### **Subcontractors**

CONTRACTOR shall include all subcontractors as insured under its policies or shall furnish to the City for review and approval, separate certificates and endorsements for each subcontractor. All coverage for subcontractors shall be subject to all of the requirements stated herein.

CONTRACTOR agrees to defend and indemnify the City of Richmond for any damage resulting to it from failure of either CONTRACTOR or any subcontractor to take out or maintain the required insurance policies. The fact that insurance is obtained by CONTRACTOR, and/or CONTRACTOR's subcontractors, will not be deemed to release or diminish the liability of CONTRACTOR, including, without limitation, liability under the indemnity provisions of this contract. Damages recoverable by CITY from CONTRACTOR or any third party will not be limited by the amount of the required insurance coverage.

### **Verification of Coverage**

All original certificates and endorsements shall be received and approved by the City **before work may begin**. The City of Richmond reserves the right to require complete, certified copies of all required insurance policies including endorsements affecting the coverage at any time.

**Original insurance certificates and required policy endorsements shall be mailed or delivered to the Designated Project Manager for the City of Richmond.**

Insurance certificates and endorsements may be faxed to the Designated Project Manager. However, CONTRACTOR must mail the original certificates and endorsements to Designated Project Manager once faxed.

### **Continuous Coverage**

CONTRACTOR shall maintain the required insurance for the life of the contract. Should the CONTRACTOR cease to have insurance as required during this time, all work by the CONTRACTOR pursuant to this agreement shall cease until insurance acceptable to the City is provided. In the event that CONTRACTOR fails to comply with the City's insurance requirements, the City may take such action as it deems necessary to protect the City's interests. Such action may include but is not limited to termination of the contract, withholding of payments, or other actions as the City deems appropriate.

If services or the scope of work extend beyond the expiration dates of the required insurance policies initially approved by the City, CONTRACTOR must provide updated certificates and endorsements indicating that the required coverage, terms and conditions are still in place. **Renewal certificates and updated endorsements shall be mailed to the Designated Project Manager.**

### **Cancellation**

CONTRACTOR shall ensure that coverage shall not be cancelled, reduced or otherwise materially changed except after thirty (30) days' prior written notice has been given to the City.

### **Reporting Requirements**

Any failure to comply with reporting or other provisions of the policies including breaches of warranties shall not affect coverage provided to the City, its officers, officials, employees or volunteers.

### **Consistent with Public Policy**

The insuring provisions, insofar as they may be judged to be against public policy shall be void and unenforceable only to the minimum extent necessary so that the remaining terms and provisions herein may be consistent with public policy and thus enforceable.



NORTCON-47

MJORDAN1

# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

10/19/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> License # 0757776 <b>HUB International Insurance Services (SOW)</b> 6565 Americas Parkway Suite 720 Albuquerque, NM 87110	<b>CONTACT NAME:</b> Melissa Jordan <b>PHONE (A/C, No, Ext):</b> <b>FAX (A/C, No):</b> <b>E-MAIL ADDRESS:</b> melissa.jordan@hubinternational.com <b>INSURER(S) AFFORDING COVERAGE</b> <b>INSURER A :</b> Bridgeway Insurance Company <b>INSURER B :</b> <b>INSURER C :</b> <b>INSURER D :</b> <b>INSURER E :</b> <b>INSURER F :</b>
	<b>NAIC #</b> 12489
<b>INSURED</b>  Northern Consulting Actuaries Inc dba Van Iwaarden Associates 100 South 5th St Suite 1900 Minneapolis, MN 55402	

**COVERAGES****CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y / N If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
<b>A</b>	<b>Professional Liab</b>			7GA7PL0000808-01	10/28/2021	10/28/2022	<b>1,000,000 PER CLAIM</b> <b>3,000,000</b>

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

**CERTIFICATE HOLDER****CANCELLATION**

City of Richmond, its Officers, Officials, Employees and Volunteers 450 Civic Center Plaza Richmond, CA 94804	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  <b>AUTHORIZED REPRESENTATIVE</b> 
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# **CITY OF RICHMOND**

## **Standard Contract Approval and Execution Routing Slip**

Contractor Name: Northern Consulting Actuaries DBA Van Iwaarden Asso. Contract# 5641 BL# 40050565 Exp. Date: 08/10/2022

Description of Services Actuarial valuation services for closed Pension Plans and Post Retirement Medical Program. Vendor # 11235

Department: Finance Project Manager: Delmy Cuellar Phone: 510-620-6790

Initial Contract Amount: \$26,000.00 Term of Contract: 7/1/2021 to 6/30/2022

Total Contract: \$ 34,000.00

Initial Contract: ☐ Amendment: 1 ☒ 2 ☐ 3 ☐ 4 ☐ Amendment \$ 8,000.00

### **Step 1:**

### **Staff Preparation**

- |                           | <b><u>Check One</u></b>   | <b><u>Attach</u></b>                |
|---------------------------|---|-------------------------------------|
| 1. Check One              | <input type="checkbox"/> Emergency Justification  | (Please Attach)                     |
|                           | <input type="checkbox"/> Sole Source Approval Signed  | (Please Attach)                     |
|                           | <input checked="" type="checkbox"/> Evidence of Competitive Bidding                                 | (Please Attach)                     |
|                           | 2. Prepare Scope of Work  | <input checked="" type="checkbox"/> |
|                           | 3. Add Insurance Provisions   | <input checked="" type="checkbox"/> |
|                           | 4. Obtain Tentative Contractor Approval (Scope of Work, General Conditions, Insurance Provisions)   | <input checked="" type="checkbox"/> |
|                           | 5. Prepare Contract   | <input checked="" type="checkbox"/> |
| 8. Check Applicable boxes | 6. Secure Legal Opinion   | <input checked="" type="checkbox"/> |
|                           | 7. Purchasing Division Approval in Munis  | <input checked="" type="checkbox"/> |
|                           | <input type="checkbox"/> Council Approval (over \$10,000) (Council Meeting Date) _____              |                                     |
|                           | <input type="checkbox"/> Finance Committee Approval (over \$100,000) (Committee Meeting Date) _____ |                                     |
|                           | <input type="checkbox"/> This contract is grant funded by _____                                     |                                     |

### **Step 2: Council Approval Process (Contracts above \$10,000)**

#### **Using Agenda Plus System to Place Items on the City Council Agenda for Action**

### **Step 3: After City Council Approval, Project Manager Executes Contract by**

Obtaining contractor signature on 3 original contracts and attaching Insurance Certificate and additional Insurance Endorsement ☒

### **Step 4: Submit Contractor Signed Documents to City Clerk**

City Clerk ensures that contract received City Council approval that took place at the \_\_\_\_\_ Council meeting. \_\_\_\_\_ City Clerk Signature

	<b><u>Delivered Date</u></b>	<b><u>Return Date</u></b>
City Attorney	_____	_____
Mayor	_____	_____
City Clerk	_____	_____

**City Clerk will return two original documents to Project Manager for the contractor and department and place a copy on the Intranet**

**Contract** 5641

**Method** Non-Encumbered GL Accounts

**Vendor** 11235 NORTHERN CONSULTING ACTUARIES

☒ To Be Rolled

☐ Hold Payments

**Standing**

☐ Original

☒ Change Order

**Status**

POSTED

APPROVED

**Audit**

Entered by 6473vlew

Entered 03/11/2022

Modified 03/11/2022 3

- Main
- Retainage
- User Defined
- Accounts
- Items
- Subcontractors
- Insurance

Main Information

**Dept/Loc** 17 FINANCE

**Bid/RFP**

**Requisition Year/Number** /

**Project**

**Description** ACTUARIAL VALUATION SERVICES

**Year** 2021 **Period** 12

**Type** OPR (OPERATING)

**Subtype**

**Review code**

**Percent complete** 0.00 as of

**Administrator** 6473dcue DELMY CUELLAR

**Workflow** None **Notification Percentage** 0.00

Dates

**Estimated start** 07/01/2021

**Estimated completion** 06/30/2022

**Bid awarded**

**Approved** 06/15/2021

**Initial expiration** 06/30/2022

**Renewal action**

**Extended through**

Days

**Original** 364

**Modified** 0

**Revised** 364

Totals

Original	26,000.00	Open Req	0.00	0.00	%
Revised	34,000.00	Open PO	0.00	0.00	%
Liquidated amt	26,000.00	Expended	26,000.00	76.47	%
Unrelieved	8,000.00	Available	8,000.00	23.53	%

Additional Information

[Milestones \(0\)](#)

[Performance \(0\)](#)

Workflow

My Approvals

Approve

Reject

Forward

Hold

Approvers





# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
03/10/2022

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<b>PRODUCER</b> <b>State Farm</b> KIM NYBO INSURANCE AGENCY INC 2724 UNIVERSITY AVE SE MINNEAPOLIS, MN 55414	<b>CONTACT NAME:</b> AMBER BRIMEYER <b>PHONE (A/C, No, Ext):</b> 612-767-7775 <b>FAX (A/C, No):</b> 612-767-7575 <b>E-MAIL ADDRESS:</b> AMBER@KIMNYBO.COM <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="text-align: center;">INSURER(S) AFFORDING COVERAGE</th> <th style="text-align: center;">NAIC #</th> </tr> <tr> <td>INSURER A : State Farm Fire and Casualty Company</td> <td>25143</td> </tr> <tr><td>INSURER B :</td><td></td></tr> <tr><td>INSURER C :</td><td></td></tr> <tr><td>INSURER D :</td><td></td></tr> <tr><td>INSURER E :</td><td></td></tr> <tr><td>INSURER F :</td><td></td></tr> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : State Farm Fire and Casualty Company	25143	INSURER B :		INSURER C :		INSURER D :		INSURER E :		INSURER F :	
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INSURER B :															
INSURER C :															
INSURER D :															
INSURER E :															
INSURER F :															
<b>INSURED</b>  NORTHERN CONSULTING ACTUARIES dba VAN IWAARDEN ASSOCIATES 10 S 5TH ST STE 840 MINNEAPOLIS, MN 55402-1010															

**COVERAGES**
**CERTIFICATE NUMBER:**
**REVISION NUMBER:**

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INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS													
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:		Y	93-ED-D044-9	01/01/2022	01/01/2023	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 4,000,000 BUSINESS PROP \$ 60,700													
A	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY			93-ED-D044-9	01/01/2022	01/01/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$													
A	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED    RETENTION \$			93-BJ-H425-3	02/09/2022	02/09/2023	EACH OCCURRENCE \$ 4,000,000 AGGREGATE \$ 4,000,000 \$													
A	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	Y	93-MD-C023-3	09/04/2021	09/04/2022	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 5%;">PER STATUTE</th> <th style="width: 5%;">OTH-ER</th> <th style="width: 90%;">LIMIT</th> </tr> <tr> <td></td> <td></td> <td>E.L. EACH ACCIDENT \$ 1,000,000</td> </tr> <tr> <td></td> <td></td> <td>E.L. DISEASE - EA EMPLOYEE \$ 1,000,000</td> </tr> <tr> <td></td> <td></td> <td>E.L. DISEASE - POLICY LIMIT \$ 1,000,000</td> </tr> </table>	PER STATUTE	OTH-ER	LIMIT			E.L. EACH ACCIDENT \$ 1,000,000			E.L. DISEASE - EA EMPLOYEE \$ 1,000,000			E.L. DISEASE - POLICY LIMIT \$ 1,000,000
PER STATUTE	OTH-ER	LIMIT																		
		E.L. EACH ACCIDENT \$ 1,000,000																		
		E.L. DISEASE - EA EMPLOYEE \$ 1,000,000																		
		E.L. DISEASE - POLICY LIMIT \$ 1,000,000																		
A	<b>FIDELITY BOND</b>			93-EW-3678-8	08/02/2021	08/02/2022	500,000													

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

**CERTIFICATE HOLDER**
**CANCELLATION**

CITY OF RICHMOND IT OFFICERS OFFICIALS, EMPLOYEE AND VOLUNTEERS 450 CIVIC CENTER PLAZA RICHMOND, CA 94804-1661	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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NORTCON-47

MJORDAN1

# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

10/19/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> License # 0757776 <b>HUB International Insurance Services (SOW)</b> 6565 Americas Parkway Suite 720 Albuquerque, NM 87110	<b>CONTACT NAME:</b> Melissa Jordan <b>PHONE (A/C, No, Ext):</b> <b>FAX (A/C, No):</b> <b>E-MAIL ADDRESS:</b> melissa.jordan@hubinternational.com <b>INSURER(S) AFFORDING COVERAGE</b> <b>INSURER A:</b> Bridgeway Insurance Company <b>INSURER B:</b> <b>INSURER C:</b> <b>INSURER D:</b> <b>INSURER E:</b> <b>INSURER F:</b>
<b>INSURED</b> Northern Consulting Actuaries Inc dba Van Iwaarden Associates 100 South 5th St Suite 1900 Minneapolis, MN 55402	<b>NAIC #</b> 12489

## COVERAGES

## CERTIFICATE NUMBER:

## REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y / N If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liab			7GA7PL0000808-01	10/28/2021	10/28/2022	1,000,000 PER CLAIM 3,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

## CERTIFICATE HOLDER

## CANCELLATION

City of Richmond, its Officers, Officials, Employees and Volunteers 450 Civic Center Plaza Richmond, CA 94804	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
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3 State Farm Plaza South P2  
Bloomington, IL 61791-0001



CITY OF RICHMOND  
450 CIVIC CENTER PLAZA  
RICHMOND CA 94804-1630

**State Farm Fire and Casualty Company**  
A stock company with home offices in Bloomington, Illinois

# Renewal Declarations

**Policy number:** 93-ED-D044-9

**Effective date:** January 1, 2022

**Policy period:** 12 months

**Expiration date:** January 1, 2023

*The policy period begins and ends at 12:01 am standard time at the premises location.*

## OFFICE POLICY

**Automatic renewal** - If the State Farm® policy period is shown as **12 months**, this policy will be renewed automatically subject to the premiums, rules and forms in effect for each succeeding policy period. If this policy is terminated, we will give you and the Mortgagee/Lienholder written notice in compliance with the policy provisions or as required by law.

## NAMED INSURED

NORTHERN CONSULTING ACTUARIES DBA VAN IWAARDEN ASSOCIATES

## ENTITY

Corporation

## IMPORTANT MESSAGE(S)

To obtain a copy of your policy, please contact your State Farm Agent.

## POLICY PREMIUM

***This is not a bill.*** If an amount is due, then a separate statement will be sent prior to the due date. The premium(s) shown below is the 12 months premium(s) for the characteristics of the policy as described in this Declarations.

**Premium:** \$951.00

**Minnesota Fire Safety Surcharge:** \$1.47

**Minnesota Firefighters Relief Surcharge:** \$2.15

**Total Premium:** \$954.62

## Discounts applied:

Automatic Sprinkler Protection

Business Experience Rating

Renewal Discount

Protective Devices

Years in Business



## SECTION I - PROPERTY SCHEDULE

Location number	Location of described premises	Limit of Insurance* Coverage A - Building	Limit of Insurance* Coverage B - Business Personal Property	Seasonal increase - Business Personal Property
002	50 S 6th St Ste 975 Minneapolis MN 55402-1557	No Coverage	\$38,138	25%
003	12450 Wayzata Blvd Ste 100 Minnetonka MN 55305-1926	No Coverage	\$11,862	25%

\* As of the effective date of this policy, the Limit of Insurance as shown includes any increase in the limit due to Inflation Coverage.

## SECTION I – INFLATION COVERAGE INDEX(ES)

Cov A - Inflation Coverage Index: N/A  
Cov B - Consumer Price Index: 273.6

## SECTION I – DEDUCTIBLES

**BASIC DEDUCTIBLE** \$500

### SPECIAL DEDUCTIBLES:

Employee Dishonesty: \$250  
Equipment Breakdown: \$500  
Money and Securities: \$250

Other deductibles may apply - refer to policy.

## SECTION I – EXTENSIONS OF COVERAGE - LIMIT OF INSURANCE - EACH DESCRIBED PREMISES

The coverages and corresponding limits shown below apply separately to each described premises shown in these Declarations, unless indicated by “See schedule”. If a coverage does not have a corresponding limit shown below, but has “Included” indicated, refer to that policy provision for an explanation of that coverage.

Coverage	Limit of Insurance
Accounts Receivable	See Schedule
Arson Reward	\$5,000
Back-up of Sewer or Drain	See Schedule
Collapse	Included
Damage to Non-owned Buildings from Theft, Burglary or Robbery	Coverage B Limit
Debris Removal	25% of covered loss
Equipment Breakdown	Included
Fire Department Service Charge	\$5,000
Fire Extinguisher Systems Recharge Expense	\$5,000
Forgery or Alteration	\$10,000
Glass Expenses	Included



Coverage	Limit of Insurance
Money Orders and Counterfeit Money	\$1,000
Money and Securities	See Schedule
Newly Acquired Business Personal Property (applies only if this policy provides Coverage B - Business Personal Property)	\$100,000
Newly Acquired or Constructed Buildings (applies only if this policy provides Coverage A - Buildings)	\$250,000
Ordinance or Law - Equipment Coverage	Included
Outdoor Property	See Schedule
Personal Effects (applies only to those premises provided Coverage B - Business Personal Property)	\$5,000
Personal Property Off Premises	\$15,000
Pollutant Clean Up and Removal	\$10,000
Preservation of Property	30 days
Property of Others (applies only to those premises provided Coverage B - Business Personal Property)	See Schedule
Signs	See Schedule
Unauthorized Business Card Use	\$5,000
Valuable Papers and Records	See Schedule
Water Damage, Other Liquids, Powder or Molten Material Damage	Included

#### SECTION I - EXTENSIONS OF COVERAGE - LIMIT OF INSURANCE - SCHEDULE

The coverages and corresponding limits shown below apply only to the described premises as shown.

Location number	Coverage	Limit of Insurance
002	Accounts Receivable	
	On Premises Limit	\$50,000
	Off Premises Limit	\$15,000
	Back-up of Sewer or Drain	\$15,000
	Money and Securities	
	On Premises Limit	\$10,000
	Off Premises Limit	\$5,000
	Outdoor Property	\$5,000
	Property of Others (applies only to those premises provided Coverage B-Business Personal Property)	\$2,500
	Signs	\$2,500



Location number	Coverage	Limit of Insurance
	Valuable Papers and Records	
	On Premises Limit	\$50,000
	Off Premises Limit	\$15,000
003	Accounts Receivable	
	On Premises Limit	\$50,000
	Off Premises Limit	\$15,000
	Back-up of Sewer or Drain	\$15,000
	Money and Securities	
	On Premises Limit	\$10,000
	Off Premises Limit	\$5,000
	Outdoor Property	\$5,000
	Property of Others (applies only to those premises provided Coverage B-Business Personal Property)	\$2,500
	Signs	\$2,500
	Valuable Papers and Records	
	On Premises Limit	\$50,000
	Off Premises Limit	\$15,000

#### SECTION I - EXTENSIONS OF COVERAGE - LIMIT OF INSURANCE - PER POLICY

The coverages and corresponding limits shown below are the most we will pay regardless of the number of described premises shown in these Declarations.

Coverage	Limit of Insurance
Dependent Property - Loss of Income	\$5,000
Employee Dishonesty	\$10,000
Loss of Income and Extra Expense	12 Months Actual Loss Sustained
Utility Interruption - Loss of Income	\$10,000

#### SECTION II - LOCATION SCHEDULE

Location number	Location of described premises
002	50 S 6th St Ste 975 Minneapolis MN 55402-1557
003	12450 Wayzata Blvd Ste 100 Minnetonka MN 55305-1926



## SECTION II - LIABILITY

Coverage	Limit of Insurance
Coverage L - Business Liability Per Occurrence	\$2,000,000
Coverage M - Medical Expenses	\$5,000 Any One Person
Damage to Premises Rented to You	\$300,000
Hired Auto Liability	Included in Coverage L

Aggregate Limits	Limit of Insurance
Products/Completed Operations Aggregate	\$4,000,000
General Aggregate	\$4,000,000

Each paid claim for Liability Coverage reduces the amount of insurance we provide during the applicable annual period. Please refer to Section II – Liability in the Coverage Form and any attached endorsements.

Your policy consists of these Declarations, the BUSINESSOWNERS COVERAGE FORM shown below, and any other forms and endorsements that apply, including those shown below as well as those issued subsequent to the issuance of this policy.

## FORMS AND ENDORSEMENTS

553-2795 MN	Fire Safety Surcharge
CMP-4100	Businessowners Coverage Form
CMP-4223.1	Amendatory Endorsement (Minnesota)
CMP-4536	Additional Insured - Owners, Lessees or Contractors (Scheduled)
CMP-4561.1	Policy Endorsement
CMP-4703.1	Utility Interruption - Loss of Income
CMP-4704.1	Dependent Property - Loss of Income
CMP-4705.2	Loss of Income and Extra Expense
CMP-4709	Money and Securities
CMP-4710	Employee Dishonesty
CMP-4746.1	Hired Auto Liability
CMP-4785.1	Additional Insured - Owners, Lessees or Contractors (Blanket)
CMP-4787	Waiver of Transfer of Rights of Recovery Against Others To Us
CMP-4788	Additional Insured - Managers or Lessors of Premises
CMP-4819.1	Unauthorized Business Card Use
CMP-4899	Back-up of Sewer or Drain
FD-6007	Inland Marine Attaching Declarations
FE-3650	Actual Cash Value Endorsement
FE-6999.3	Policyholder Disclosure Notice of Terrorism Insurance Coverage

## SCHEDULE OF ADDITIONAL INTEREST(S)

Interest type: Owners, Lessees, or Contractors (Schedul  
 Endorsement number: CMP-4536  
 Loan number: N/A  
 CITY OF RICHMOND  
 450 Civic Center Plaza  
 Richmond CA 94804-1630

## FULL NAMED INSURED

**Named Insured:** NORTHERN CONSULTING ACTUARIES DBA VAN IWAARDEN ASSOCIATES



This policy is issued by the State Farm Fire and Casualty Company.

#### **PARTICIPATING POLICY**

You are entitled to participate in a distribution of the earnings of the company as determined by our Board of Directors in accordance with the Company's Articles of Incorporation, as amended.

In Witness Whereof, the State Farm Fire and Casualty Company has caused this policy to be signed by its President and Secretary at Bloomington, Illinois.

A handwritten signature in black ink, reading "Michael J. Tignor".

President

A handwritten signature in black ink, reading "Lynne M. Yourell".

Secretary

#### **NOTICE TO POLICYHOLDER:**

For a comprehensive description of coverage and forms, please refer to your policy.

Policy changes requested before the "Date Prepared", which appear on this notice, are effective on the Renewal Date of this policy unless otherwise indicated by a separate endorsement, binder, or amended declarations. Any coverage forms attached to this notice are also effective on the Renewal Date of this policy.

Policy changes requested after the "Date Prepared" will be sent to you as an amended declarations or as an endorsement to your policy. Billing for any additional premium for such changes will be mailed at a later date.

If, during the past year, you've acquired any valuable property items, made any improvements to insured property, or have any questions about your insurance coverage, contact your State Farm agent.

Please keep this with your policy.

#### **Your coverage amount....**

It is up to you to choose the coverage and limits that meet your needs. We recommend that you purchase a coverage limit equal to the estimated replacement cost of your structure. Replacement cost estimates are available from building contractors and replacement cost appraisers, or, your agent can provide an estimate from Xactware, Inc. using information you provide about your structure. State Farm does not guarantee that any estimate will be the actual future cost to rebuild your structure. Higher limits are available at higher premiums. Lower limits are also available, as long as the amount of coverage meets our underwriting requirements. We encourage you to periodically review your coverages and limits with your agent and to notify us of any changes or additions to your structure.

3 State Farm Plaza South P2  
Bloomington, IL 61791-0001



CITY OF RICHMOND  
450 CIVIC CENTER PLAZA  
RICHMOND CA 94804-1630

**State Farm Fire and Casualty Company**  
A stock company with home offices in Bloomington, Illinois

# Inland Marine Attaching Declarations

**Policy number:** 93-ED-D044-9

**Effective date:** January 1, 2022

**Policy period:** 12 months

**Expiration date:** January 1, 2023

*The policy period begins and ends at 12:01 am standard time at the premises location.*

## ATTACHING INLAND MARINE

**Automatic renewal** - If the State Farm® policy period is shown as **12 months**, this policy will be renewed automatically subject to the premiums, rules and forms in effect for each succeeding policy period. If this policy is terminated, we will give you and the Mortgagee/Lienholder written notice in compliance with the policy provisions or as required by law.

**Annual policy premium:** Included

The above premium amount is included in the Policy Premium shown on the Declarations.

## FULL NAMED INSURED

**Named Insured:** NORTHERN CONSULTING ACTUARIES DBA VAN IWAARDEN ASSOCIATES

Your policy consists of these Declarations, the INLAND MARINE CONDITIONS shown below, and any other forms and endorsements that apply, including those shown below as well as those issued subsequent to the issuance of this policy.

## FORMS, OPTIONS AND ENDORSEMENTS

**FE-8739** Inland Marine Conditions  
**FE-8743.1** Inland Marine Computer Property Form  
See below for schedule page with limits

## ATTACHING INLAND MARINE SCHEDULE PAGE

Endorsement number	Coverage	Limit of insurance	Deductible amount	Annual premium
FE-8743.1	Inland Marine Computer Property Form	\$25,000	\$500	Included
	Loss of Income and Extra Expense	\$25,000		Included

Other limits and exclusions may apply - refer to your policy.

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

## **ADDITIONAL INSURED — OWNERS, LESSEES, OR CONTRACTORS (Scheduled)**

This endorsement modifies insurance provided under the following:

BUSINESSOWNERS COVERAGE FORM

### **SCHEDULE**

**Policy Number:** 93-ED-D044-9

**Named Insured:**

NORTHERN CONSULTING ACTUARIES DBA VAN IWAARDEN ASSOCIATES

100 S 5TH ST STE 1900

MINNEAPOLIS MN 55402-1267

**Name And Address Of Additional Insured Person Or Organization:**

CITY OF RICHMOND ITS OFFICERS, OFFICIALS, EMPLOYEES, AND VOLUNTEERS

450 Civic Center Plaza

Richmond CA 94804-1630

1. **SECTION II — WHO IS AN INSURED** of **SECTION II — LIABILITY** is amended to include, as an additional insured, any person or organization shown in the Schedule, but only with respect to liability for “bodily injury”, “property damage”, or “personal and advertising injury” caused, in whole or in part, by:

**a. Ongoing Operations**

- (1) Your acts or omissions; or
- (2) The acts or omissions of those acting on your behalf;

in the performance of your ongoing operations for that additional insured; or

**b. Products-Completed Operations**

“Your work” performed for that additional insured and included in the “products-completed operations hazard”.

- 2. Any insurance provided to the additional insured shall only apply with respect to a claim made or a “suit” brought for damages for which you are provided coverage.
- 3. Primary Insurance. The insurance afforded the additional insured shall be primary insurance. Any insurance carried by the additional insured shall be noncontributory with respect to coverage provided by you.

All other policy provisions apply.

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

## **WAIVER OF TRANSFER OF RIGHTS OF RECOVERY AGAINST OTHERS TO US**

This endorsement modifies insurance provided under the following:

BUSINESSOWNERS COVERAGE FORM

### **SCHEDULE**

**Policy Number:** 93-ED-D044-9

**Named Insured:**

NORTHERN CONSULTING ACTUARIES DBA VAN IWAARDEN ASSOCIATES

100 S 5TH ST STE 1900

MINNEAPOLIS MN 55402-1267

**Name And Address Of Person Or Organization:**

CITY OF RICHMOND ITS OFFICERS, OFFICIALS, EMPLOYEES, AND VOLUNTEERS

450 Civic Center Plaza

Richmond CA 94804-1630

The following is added to Paragraph **10.b.** of **SECTION I AND SECTION II — COMMON POLICY CONDITIONS:**

We waive any right of recovery we may have against the person or organization shown in the Schedule because of payments we make for injury or damage arising out of:

- a.** Your ongoing operations; or
- b.** "Your work" done under contract with that person or organization and included in the "products-completed operations hazard".

This waiver applies only to the person or organization shown in the Schedule.

All other policy provisions apply.

## CITY OF RICHMOND STANDARD CONTRACT

Department: Finance	Project Manager: Delmy Cuellar
Project Manager E-mail: Delmy_Cuellar@ci.richmond.ca.us	Project Manager Phone No: (510) 620-6790
PR No: Vendor No: 11235	P.O./Contract No: 5641
Description of Services: Actuarial Valuation services for closed Pension Plans and Post Retirement Medical program.	

The parties to this STANDARD CONTRACT do mutually agree and promise as follows:

1. Parties. The parties to this Contract are the City of Richmond (herein referred to as the "City") and the following named Contractor:  

Northern Consulting Actuaries, Inc. DBA Van Iwaarden Assoc.

Company Name: \_\_\_\_\_

Street Address: 100 South 5th Street, Suite 1900 \_\_\_\_\_

City, State, Zip Code: Minneapolis, MN 55402-1010 \_\_\_\_\_

Contact Person: Mark Schulte \_\_\_\_\_

Telephone: (612) 596-5971      Email: MarkS@vaniwaaden.com \_\_\_\_\_

Business License No: 40050565      / Expiration Date: August 10, 2021 \_\_\_\_\_

A California ☒ corporation, ☐ limited liability corporation ☐ general partnership, ☐ limited partnership, ☐ individual, ☐ non-profit corporation, ☐ individual dba as [specify:] \_\_\_\_\_, ☐ other [specify:] \_\_\_\_\_
2. Term. The effective date of this Contract is July 1, 2021 and it terminates June 30, 2022 unless terminated as provided herein.
3. Payment Limit. City's total payments to Contractor under this Contract shall not exceed \$ 26,000.00 . City shall not pay for services that exceed the Contract Payment Limit unless a contract amendment has been approved by the City Council or City Manager.
4. Contractor's Obligations. Contractor shall provide those services and carry out that work described in the Service Plan (Exhibit A) which is attached hereto and is incorporated herein by reference, subject to all the terms and conditions contained or incorporated herein.
5. City's Obligations. City shall make to the Contractor those payments described in the Payment Provisions (Exhibit B) which are attached hereto and are incorporated herein by reference, subject to all the terms and conditions contained or incorporated herein.

6. Authorized Representatives and Notices. This Contract is subject to the Authorized Representatives and Notices Provisions (Exhibit C) which are attached hereto and are incorporated herein by reference.
7. General Conditions. This Contract is subject to the General Conditions (Exhibit D) which are attached hereto and are incorporated herein by reference, subject to all the terms and conditions contained or incorporated herein.
8. Special Conditions. This Contract is subject to the Special Conditions (Exhibit E) (if any) which are attached hereto and are incorporated herein by reference, subject to all the terms and conditions contained or incorporated herein. (Note: other than Public Works contracts, the City will agree to Special Conditions only in unusual circumstances.)
9. Insurance Provisions. This Contract is subject to the Insurance Provisions (Exhibit F) which are attached hereto and are incorporated herein by reference.
10. Signatures. These signatures attest the parties' Contract hereto:

CITY OF RICHMOND  
a municipal corporation

By: 

Title:

I hereby certify that this Contract  
has been approved by City Council.

By: 

City Clerk

Approved as to form:

By: 

City Attorney

CONTRACTOR:

Northern Consulting Actuaries, Inc. DBA Van  
Iwaarden Assoc.

(\* The Corporation Chairperson of the Board,  
President or Vice President should sign below)

By: 

Title: President

Date Signed: 6/21/2021

(\* The Corporation Chief Financial Officer,  
Secretary or Assistant Secretary should sign below)

By: 

Title: CFO


Date Signed: 6/21/2021

(NOTE: Pursuant to California Corporations  
Code Section 313, if Contractor is a corporation  
or nonprofit organization, this Contract (1) must  
be signed by (a) the Chairperson of the Board,  
President or Vice-President and (b) the  
Secretary any Assistant Secretary, the Chief  
Financial Officer or any Assistant Treasurer.

LIST OF ATTACHMENTS:

Service Plan  
Payment Provisions  
Authorized Representatives and Notices  
General Conditions  
Special Conditions  
Insurance Provisions  
Standard Contract/EJ/TE 9-26-07

Exhibit A  
Exhibit B  
Exhibit C  
Exhibit D  
Exhibit E  
Exhibit F

 FOR B. BROWN  
6/28/21

For the Contract between the City of  
Richmond and  
Northern Consulting Actuaries, Inc. DBA Van  
Iwaarden Assoc.

**EXHIBIT A**  
**SERVICE PLAN**

Finance Director

Contractor shall, to the satisfaction of the \_\_\_\_\_, perform the following services and be compensated as outlined below:

- Discuss administrative draft of the report with city personnel at city location. An annual meeting or video conference with City staff or the City Council are included.
- Present final report at regularly scheduled City Council meeting. Preparation and additional meetings shall be billed at regular hourly rates.
- City valuation report date will be the beginning of the fiscal year in July. Contractor shall continue preparing the City July 1 actuarial valuations.
- Conduct initial discussions with the City to develop an in-depth understanding of its post-retirement health care plan in order to learn about data availability, management information system capabilities and to discuss specific issues the City would like to address during the review.
- Submit written data requests to the City (email is acceptable).
- Gather and compile data provided by the City and review for reasonableness. Anomalies (if any) should be identified and clarified as appropriate.
- Provide City with professional services and dedicated personnel to perform the following:
  - Analyze the data to assess any inconsistencies and make recommendations for enhancing data quality
  - Prepare actuarial valuation reports every other year for General Pension, Garfield Pension, Police and Fire Pension Plans that follow GASB 67/68 standards, and City OPEB and RPOA OPEB Plans that follow GASB 74/75 standards.
  - Prepare the necessary material for the Comprehensive Annual Financial Report (CAFR) to comply with GASB OPEB reporting and disclosure requirements.
  - Prepare an analysis to determine how establishing a trust or equivalent arrangement would affect the interest rate assumption. Timing considerations of establishing the trust should also be considered.
  - Prepare a cash flow analysis (the "pay-as-you-go-cost"). Standard reports include benefit payout projections, broken out by current and future retirees.
  - Prepare a sensitivity analysis showing the impact of alternative assumptions on the employer's contributions (healthcare trend rates and investment rate assumptions).
  - Provide strategies for funding and, reducing costs.

For the Contract between the City of  
Richmond and  
Northern Consulting Actuaries, Inc. DBA Van  
Iwaarden Assoc.

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**EXHIBIT B  
PAYMENT PROVISIONS**

***{PLEASE NOTE THAT THE CITY OF RICHMOND SHALL NOT PAY FOR SERVICES THAT EXCEED THE CONTRACT PAYMENT LIMIT UNLESS A CONTRACT AMENDMENT HAS BEEN APPROVED BY THE CITY COUNCIL OR THE CITY MANAGER}***

1. Provided Contractor is not in default under this Contract, Contractor shall be compensated as provided below.
2. Any and all payments made pursuant to this Contract shall be subject to the Contract Payment Limit. The Payment Limit includes expenses (phones, photo copying, meals and travel etc). Invoices, shall be adequately detailed, based on accurate records, and be in a form reasonably satisfactory to the City. Contractor may be required to provide back-up material upon request.
3. Contractor shall submit timely invoices to the following address:  
  
Attention: City of Richmond, Finance Department - Accounts Payable  
Project Manager: Delmy Cuellar Department: Finance  
PO Box 4046  
Richmond, CA 94804-0046
4. All invoices that are submitted by Contractor shall be subject to the approval of the City's Project Manager, Delmy Cuellar before payments shall be authorized.
5. The City will pay invoice(s) within 45 days after completion of services to the City's satisfaction. The City shall not pay late fees or interest.
6. A Richmond business license shall be obtained before any payment under this Contract shall be authorized and the business license must be kept current during the term of this Contract for payments to continue to be authorized.
7. All insurance coverage required by this Contract shall be provided by the Contractor before this Contract shall be executed by the City. The insurance coverage must be kept current during the term of this Contract for payments to continue to be authorized.

For the Contract between the City of  
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Northern Consulting Actuaries, Inc. DBA Van  
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**EXHIBIT C**  
**AUTHORIZED REPRESENTATIVES AND NOTICES**

1. Notices. All notices, demands, statements, or communications provided for by this Contract shall be in writing and may be delivered by deposit in the United States mail, postage prepaid. Notices to the City shall be addressed to the Department Head and (as delineated below in section 1.1) to the project manager responsible for the administration of or the supervision of the scope of work under this Contract. Notices to the Contractor shall be addressed to the party designated by Contractor (as delineated below in section 1.2). Notice shall be deemed delivered (a) upon personal delivery; (b) as of the fifth business day after mailing by United States certified mail, postage prepaid, addressed to the proper party; or (c) as of 12:00 p.m. on the second business day immediately after the day it is deposited with and accepted by Federal Express, or a similar overnight courier service, addressed to the proper party and marked for next business day morning delivery. For the purposes of this Contract, a "business day" means any day Monday through Friday that is not a holiday recognized by the federal government or the State of California.

1. 1 CITY hereby designates as its Authorized Representative the Project Manager whose name and address are as follows:

Delmy Cuellar

City of Richmond

450 Civic Center Plaza - Finance Department

Richmond, CA 94804-0046

1. 2 CONTRACTOR hereby designates as its Authorized Representative the Project Manager whose name and address are as follows:

Mark Schulte

Northern Consulting Actuaries, Inc. DBA Van Iwaarden Assoc.

100 South 5th Street, Suite 1900

Minneapolis, MN 55402-1010

## EXHIBIT D GENERAL CONDITIONS

1. Independent Contractor. Contractor acknowledges, represents and warrants that Contractor is not a regular or temporary employee, joint venturer or partner of the City, but rather an independent Contractor. This Contract shall not be construed to create an agency, servant, employee, partnership, or joint venture relationship. As an independent Contractor, Contractor shall have no authority to bind City to any obligation or to act as City's agent except as expressly provided herein. Due to the independent Contractor relationship created by this Contract, City shall not withhold state or federal income taxes, the reporting of which shall be Contractor's sole responsibility.
2. Brokers. Contractor acknowledges, represents and warrants that Contractor has not hired, retained or agreed to pay any entity or person any fee, commission, percentage, gift, or any other consideration, contingent upon or resulting from the award or making of this Contract.
3. City Property. The rights to applicable plans, drawings, reports, calculations, data, specifications, videos, graphics or other materials prepared for or obtained pursuant to this Contract, which, upon request, are to be delivered to City within a reasonable time, shall be deemed assigned to City. If applicable, Contractor shall prepare check prints upon request. Notwithstanding the foregoing, Contractor shall not be obligated to provide to City proprietary software or data which Contractor has developed or had developed for Contractor's own use; provided, however, that Contractor shall, pursuant to Section 15 below, indemnify, defend and hold harmless City from and against any discovery or Public Records Act request seeking the disclosure of such proprietary software or data.
4. Patents, Trademarks, Copyrights and Rights in Data. Contractor shall not publish or transfer any materials, discoveries, developments, concepts, designs, ideas, know how, improvements, inventions and/or original works of authorship resulting from activities supported by this Contract without the express prior written consent of the City Manager. If anything resulting from activities supported by this Contract is patentable, trademarkable, copyrightable or otherwise legally protectable, City reserves the exclusive right to seek such intellectual property rights. Notwithstanding the foregoing, Contractor may, after receiving City's prior written consent, seek patent, trademark, copyright or other intellectual property rights on anything resulting from activities supported by this Contract. However, City reserves, and Contractor irrevocably grants, a nonexclusive, fully paid-up, royalty-free, assumable, perpetual, worldwide license, with the right to transfer, sublicense, practice and exploit said license and the right to make, have made, copy, modify, make derivative works of, use, sell,

import, and otherwise distribute under all applicable intellectual properties without restriction of any kind said license.

Contractor further agrees to assist City, at City's expense, in every proper way to secure the City's rights in any patents, trademarks, copyrights or other intellectual property rights relating thereto, including the disclosure to City of all pertinent information and data with respect thereto. Contractor shall also assist City in the execution of all applications, specifications, oaths, assignments, recordations, and all other instruments which City shall deem necessary in order to apply for, obtain, maintain and transfer such rights, or if not transferable, to waive such rights. Contractor shall further assist City in the execution of all applications, specifications, oaths, assignments, recordations and all other instruments which City shall deem necessary in order to assign and convey to City, and any assigns and nominees the sole and exclusive right, title and interest in and to any patents, trademarks, copyrights or other intellectual property rights relating thereto. Contractor further agrees that its obligation to execute or cause to be executed, when it is in Contractor's power to do so, any such instruments or papers shall continue during and at all times after the end of Contractor's services and until the expiration of the last such intellectual property right. Contractor hereby irrevocably designates and appoints City, and its duly authorized officers, agents and servants, as its agent and attorney-in-fact, to act for and in its behalf and stead to execute and file any such applications and to do all other lawfully permitted acts to further the application for, prosecution, issuance, maintenance or transfer of letters of patents, copyright and other registrations. This power of attorney is coupled with an interest and shall not be affected by Contractor's subsequent incapacity.

5. Inspection. Contractor's performance, place of business and records pertaining to this Contract are subject to monitoring, inspection, review and audit by authorized representatives of the CITY, the State of California, and the United States Government.

If the project or services set forth in Exhibit A shall be performed on City or other public property, City shall have the right to inspect such work without notice. If such project or services shall not be performed on City or other public property, City shall have the right to inspect such work upon reasonable notice.

6. Services. The project or services set forth in Exhibit A shall be performed to the full satisfaction and approval of City. In the event that the project or services set forth in Exhibit A are also itemized by price, City, in its sole discretion, may, upon notice to Contractor, delete certain items or services set forth in Exhibit A, in which case there shall be a corresponding reduction in the amount of compensation paid to Contractor.

Contractor shall, at its own cost and expense, furnish all facilities and equipment necessary for Contractor to complete the project or perform the services required herein, unless otherwise provided in Exhibit A.

7. Records. Contractor shall keep and make available for inspection and copying by authorized representatives of the City, the State of California, and the United States Government, the Contractor's regular business records and such additional records pertaining to this Contract as may be required by the City.

Contractor shall retain all documents pertaining to this Contract for a period of five (5) years after this Contract's termination (or for any further period that is required by law) and until all Federal or State audits are complete and exceptions resolved for this contract's funding period. Upon request, CONTRACTOR shall make these records available to authorized representatives of the CITY, the State of California, and the United States Government.

Contractor shall keep full and detailed accounts, maintain records, and exercise such controls as may be necessary for proper financial management under this Contract. The Contractor's accounting and control systems shall be satisfactory to City. Contractor's accounting systems shall conform to generally accepted accounting principles and all records shall provide a breakdown of total costs charged under this Contract, including properly executed payrolls, time records, utility bills, invoices and vouchers. The City shall be afforded prompt access to Contractor's records, books, and Contractor shall preserve such project records for a period of at least five (5) years after the termination of this Contract, or for such longer period as may be required by law.

Contractor shall permit City and its authorized representatives and accountants to inspect, examine and copy Contractor's books, records, accounts, correspondence, instructions, drawings, receipts, subcontracts, purchase orders, vouchers, memoranda and other data relating to the project or services set forth in Exhibit A, and any and all data relevant to this Contract at any reasonable time for the purpose of auditing and verifying statements, invoices, or bills submitted by Contractor pursuant to this Contract and shall provide such assistance as may be reasonably required in the course of such inspection. Contractor shall also allow City access to the record keeping and accounting personnel of Contractor. City further reserves the right to examine and re-examine said books, records, accounts, and data during the five (5) year period following the termination of this Contract; and Contractor shall in no event dispose of, destroy, alter, or mutilate said books, records, accounts, and data in any manner whatever for five (5) years after the termination of this Contract.

Pursuant to California Government Code § 10527, the parties to this Contract shall be subject to the examination and audit of representatives of the Auditor General of the State of California for a period of three (3) years after final payment under this Contract. The examination and audit shall be confined to those matters connected with the performance of this Contract including, but not limited to, the cost of administering this Contract.

8. Changes and Extra Work. All changes and/or extra work under this Contract shall be performed and paid for in accordance with the following:

Only the City Council or the City Manager may authorize extra and/or changed work. Contractor expressly recognizes that other City personnel are without authorization to either order extra and/or changed work or waive contract requirements. Failure of Contractor to secure the authorization for such extra and/or changed work shall constitute a waiver of any and all right to adjustment in contract price due to such unauthorized work and Contractor thereafter shall be entitled to no compensation whatsoever for performance of such extra and/or changed work.

If Contractor is of the opinion that any work which Contractor has been directed to perform is beyond the scope of this Contract and constitutes extra work, Contractor shall promptly notify City of the fact. The City shall make a determination as to whether or not such work is, in fact, beyond the scope of this Contract and constitutes extra work. In the event that City determines that such work does constitute extra work, City shall provide extra compensation to Contractor on a fair and equitable basis. A change order or Contract Amendment providing for such compensation for extra work shall be negotiated between City and Contractor and executed by Contractor and the appropriate City official.

In the event City determines that such work does not constitute extra work, Contractor shall not be paid extra compensation above that provided herein and if such determination is made by City staff, said determination may be appealed to the City Council; provided, however, a written appeal must be submitted to the City Manager within five (5) days after the staff's determination is sent to Contractor. Said written appeal shall include a description of each and every ground upon which Contractor challenges the staff's determination.

9. Additional Assistance. If this Contract requires Contractor to prepare plans and specifications, Contractor shall provide assistance as necessary to resolve any questions regarding such plans and specifications that may arise during the period of advertising for bids, and Contractor shall issue

any necessary addenda to the plans and specifications as requested. In the event Contractor is of the opinion that City's requests for addenda and assistance is outside the scope of normal services, the parties shall proceed in accordance with the changes and extra work provisions of Section 8 of these General Conditions.

10. Professional Ability. Contractor acknowledges, represents and warrants that Contractor and its employees are skilled and able to competently provide the services hereunder, and possess all professional licenses, certifications, and approvals necessary to engage in their occupations. City has relied upon the professional ability and training of Contractor as a material inducement to enter into this Contract. Contractor shall perform in accordance with generally accepted professional practices and standards of Contractor's profession. In the event that City, in its sole discretion, desires the removal of any person employed or retained by Contractor to perform services hereunder, such person shall be removed immediately upon receiving notice from City.
11. Business License. Contractor shall obtain a Richmond Business License before performing any services required under this Contract. The failure to so obtain such license shall be a material breach of this Contract and grounds for immediate termination by City; provided, however, that City may waive the business license requirement in writing under unusual or extraordinary circumstances without necessitating any modification of this Contract to reflect such waiver.
12. Termination Without Default. Notwithstanding any provision herein to the contrary, City may, in its sole and absolute discretion and without cause, terminate this Contract at any time prior to completion by Contractor of the project or services hereunder, immediately upon written notice to Contractor. Contractor may terminate this Contract at any time in its sole and absolute discretion and without cause upon 30 days' written notice to City. In the event of termination by either party, Contractor shall be compensated for: (1) all authorized work satisfactorily performed prior to the effective date of termination; (2) necessary materials or services of others ordered by Contractor for this Contract, prior to receipt of notice of termination, irrespective of whether such materials or services of others have actually been delivered, provided that Contractor is not able to cancel such orders. Compensation for Contractor in such event shall be determined by City in accordance with the percentage of the project or services completed by Contractor; and all of Contractor's finished or unfinished work product through the time of the City's last payment shall be transferred and assigned to City. Additionally, in the event of such termination, the City may proceed with the work in any reasonable manner it chooses.

13. Termination in the Event of Default. Should Contractor fail to perform any of its obligations hereunder, within the time and in the manner provided or otherwise violate any of the terms of this Contract, City may immediately terminate this Contract by giving written notice of such termination, stating the reasons for such termination. Contractor shall be compensated as provided in Section 12 of these General Conditions; provided, however, there shall be deducted from such amount the amount of damage, including attorney's fees, expert witness fees and costs, if any, sustained by City by virtue of Contractor's breach of this Contract. Additionally, in the event of such termination, the City may proceed with the work in any reasonable manner it chooses.
14. Conflict of Interest. Contractor acknowledges, represents and warrants that Contractor shall avoid all conflicts of interest (as defined under any federal, state or local statute, rule or regulation, or at common law) with respect to this Contract. Contractor further acknowledges, represents and warrants that no City official or employee has any economic interest, as defined in Title 2, California Code of Regulations §§ 18703.1 through 18703.5, with Contractor that would invalidate this Contract. Contractor acknowledges that in the event that Contractor shall be found by any judicial or administrative body to have any conflict of interest (as defined above) with respect to this Contract, all consideration received under this Contract shall be forfeited and returned to City forthwith. This provision shall survive the termination of this Contract for one (1) year.
15. Indemnification.
- (a) If this Contract is a contract for design professional services subject to California Civil Code Section 2782.8(a) and Contractor is a design professional, as defined in California Civil Code Section 2782.8(b)(2), Contractor shall hold harmless, defend and indemnify the City, its officers, agents, employees, and volunteers from and against any and all claims, damages, losses, and expenses including attorneys' fees arising out of, or pertaining to, or relating to the negligence, recklessness, or willful misconduct of the Contractor, except where caused by the active negligence, sole negligence, or willful misconduct of the City. To the fullest extent permitted by law, Contractor shall immediately defend and indemnify the City and its officers, agents, employees, and volunteers from and against any and all liabilities, regardless of nature or type, that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of the Contractor, or its employees, agents, or subcontractors. Liabilities subject to the duties to defend and indemnify include, without limitation, any and all claims, losses, damages, penalties, fines, and judgments; associated investigation and administrative expenses; defense costs, including but not limited to reasonable attorneys' fees; court costs; and costs of alternative dispute resolution. Contractor's obligation to

indemnify applies unless it is finally adjudicated that the liability was caused by the sole active negligence or sole willful misconduct of an indemnified party.

- (b) If this Contract is not a contract for design professional services subject to California Civil Code Section 2782.8(a) or Contractor is not a design professional as defined in California Civil Code Section 2782.8(b)(2), Contractor shall indemnify, defend, and hold harmless the City, its officers, agents, employees and volunteers from any and all claims, suits, or actions of every name, kind and description, brought forth on account of injuries to or death of any person or damage to property arising from or connected with the willful misconduct, negligent acts, errors or omissions, ultra-hazardous activities, activities giving rise to strict liability, or defects in design by Contractor or any person directly or indirectly employed by, or acting as, the agent for Contractor in the performance of this Contract, including the concurrent or successive passive negligence of the City, its officers, agents, employees or volunteers.
- (c) It is understood that the duty of Contractor to indemnify and hold harmless includes the duty to defend as set forth in Section 2778 of the California Civil Code. Contractor shall be obligated to defend, in all legal, equitable, administrative, or special proceedings, with counsel approved by the City, the City and its officers, agents, employees, and volunteers, immediately upon tender to Contractor of the claim in any form or at any stage of an action or proceeding, whether or not liability is established. An allegation or determination that persons other than Contractor are responsible for the claim does not relieve Contractor from its separate and distinct obligation to defend under this Section 15. The obligation to defend extends through final judgment, including exhaustion of any appeals. The defense obligation includes an obligation to provide independent counsel if Contractor asserts that liability is caused in whole, or in part, by the negligence or willful misconduct of an indemnified party.
- (d) The review, acceptance or approval of the Contractor's work or work product by any indemnified party shall not affect, relieve or reduce the Contractor's indemnification or defense obligations. This Section 15 survives completion of the services or the termination of this Contract. The provisions of this Section 15 are not limited by, and do not affect, the provisions of this Contract relating to insurance.
- (e) Acceptance of insurance certificates and endorsements required under this Contract does not relieve Contractor from liability under this Section 15. This Section 15 shall apply whether or not such insurance policies are determined to be applicable to any such damages or claims for damages.

16. Safety. Contractor acknowledges that the City is committed to the highest standards of workplace safety. Contractor shall perform all work hereunder in full compliance with applicable local, state and federal safety requirements including but not limited to Occupational Safety and Health Administration requirements, and shall assume sole and complete

responsibility for the safety of Contractor's employees and any subContractor's employees. If a death, serious personal injury or substantial property damage occurs in connection with the performance of this Contract, Contractor shall immediately notify the City by telephone.

17. Insurance. Insurance requirements are set forth in Exhibit F to this Contract. Contractor shall abide by the insurance requirements set forth in said Exhibit F.
18. Non-Liability of Officials and Employees of the City. No official or employee of the City shall be personally liable for any default or liability under this Contract.
19. Compliance with Laws. Contractor shall comply with all federal, state and local laws, statutes, ordinances, rules and regulations, and the orders and decrees of any courts or administrative bodies or tribunals, with respect to this Contract, including without limitation environmental laws, employment discrimination laws and prevailing wage laws. Compliance under this provision includes compliance with all provisions of the Richmond Municipal Code ("Municipal Code"), including Chapters 2.50, 2.52, 2.56, and 2.60, if applicable.

Contractor acknowledges that under § 2.60.070 of the Municipal Code ("Living Wage Ordinance"), Contractor shall promptly provide to City documents and information verifying its compliance with the Living Wage Ordinance. Also as prescribed in § 2.60.070, Contractor shall notify each of its affected employees with regards to the wages that are required to be paid pursuant to the Living Wage Ordinance.

Contractor shall comply with § 2.28.030 of the Municipal Code, obligating every Contractor or subcontractor under a contract or subcontract with the City for public work or for goods or for services to refrain from discriminatory employment or subcontracting practices on the basis of race, color, sex, sexual orientation, religious creed, national origin or ancestry of any employee, any applicant for employment or any potential subcontractor.

Contractor acknowledges that the City's Drug Free Workplace Policy, Violence in the Workplace Policy and the Policy Against Workplace Harassment, are available on the City's website at <http://www.ci.richmond.ca.us/workplacepolicies> . Contractor agrees to abide by the terms and conditions of said policies.

20. Limitations upon Subcontracting and Assignment. This Contract binds the heirs, successors, assigns and representatives of Contractor. The Contractor shall not enter into subcontracts for any work contemplated

under this Contract and shall not assign this Contract, nor any portion hereof or monies due or to become due, without the prior written consent of the City Council or its designee.

Contractor acknowledges that the services which Contractor shall provide under this Contract are unique, personal services which, except as otherwise provided herein, Contractor shall not assign or sublet to any other party without the prior written approval of City, which approval may be withheld in City's sole and absolute discretion. In the event that City, in writing, approves any assignment or subletting of this Contract or the retention of subcontractors by Contractor, Contractor shall provide to City upon request copies of each and every subcontract contract prior to the execution thereof by Contractor and subcontractor. Any assignment by Contractor of any or all of its rights under this Contract without first obtaining City's prior written consent shall be a default under this Contract.

The sale, assignment, transfer or other disposition of any of the issued and outstanding capital stock of Contractor (if applicable), or of the interest of any general partner or joint venturer or syndicate member if Contractor is a partnership or joint-venture or syndicate, which shall result in a change of control of Contractor, shall be deemed an assignment. For this purpose, control shall mean fifty percent or more of the voting power or twenty-five percent or more of the assets of the corporation, partnership or joint-venture.

21. Integration. This Contract constitutes the entire agreement between the parties concerning the subject matter hereof and supersedes any previous oral or written agreement; provided, however, that correspondence or documents exchanged between Contractor and City may be used to assist in the interpretation of the Exhibits to this Contract.
22. Modifications and Amendments. This Contract may be modified or amended only by a change order or Contract Amendment executed by both parties and approved as to form by the City Attorney.
23. Conflicting Provisions. In the event of a conflict between these General Conditions and those of any Exhibit or attachment hereto, these General Conditions shall prevail; provided, however, that any Special Conditions as set forth in Exhibit E shall prevail over these General Conditions. In the event of a conflict between the terms and conditions of any two or more Exhibits or attachments hereto, those prepared by City shall prevail over those prepared by the Contractor, and the terms and conditions preferred by the City shall prevail over those preferred by the Contractor.
24. Non-exclusivity. Notwithstanding any provision herein to the contrary, the services provided by Contractor hereunder shall be non-exclusive, and

City reserves the right to employ other Contractors in connection with the project.

25. Exhibits. All Exhibits hereto are made a part hereof and incorporated herein by reference; provided, however, that any language in Exhibit A which does not pertain to the project description, proposal, scope of services, or method of compensation (as applicable) , or any corresponding responsibilities of City, shall be deemed extraneous to, and not a part of, this Contract.
26. Force Majeure. Neither party hereto shall be considered in default in the performance of its obligations hereunder to the extent that the performance of such an obligation is prevented or delayed by reason of acts of God, strikes, boycotts, lock-outs, inability to procure materials not related to the price thereof, failure of power, restrictive governmental laws and regulations enacted after the date of this Contract, riots, civil unrest, acts of terrorism, insurrection, war, declaration of a state or national emergency or other reasons of a like nature not within the reasonable control of such party.
27. Time of the Essence. Time is of the essence of this Contract. Contractor and City agree that any time period set forth in Exhibit A represents their best estimates with respect to completion dates and both Contractor and City acknowledge that departures from the schedule may occur. Therefore, both Contractor and City will use reasonable efforts to notify one another of changes to the schedule. Contractor shall not be responsible for performance delays caused by others, or delays beyond Contractor's control, and such delays shall extend the times for performance of Contractor's work.
28. Confidentiality. Contractor agrees to comply with, and to require its employees, agents and partners to comply with, all applicable State or Federal statutes or regulations respecting confidentiality, including but not limited to, the identity of persons served under this Contract, their records, or services provided them, and assures that:

All applications and records concerning any individual made or kept by Contractor or any public officer or agency in connection with the administration of or relating to services provided under this Contract will be confidential, and will not be open to examination for any purposes not directly connected with the administration of such service.

No person will publish or disclose or permit or cause to be published or disclosed, any list of persons receiving services, except as may be required in the administration of such service.

29. Third Parties. Nothing herein shall be interpreted as creating any rights or benefits in any third parties. For purposes hereof, transferees or assignees as permitted under this Contract shall not be considered "third parties."
30. Governing Law. This Contract shall be construed in accordance with the law of the State of California without regard to principles of conflicts of law. This Contract is made in Contra Costa County, California, and any action relating to this Contract shall be instituted and prosecuted in the courts of Contra Costa County, California.
31. Nonrenewal. Contractor understands and agrees that there is no representation, implication, or understanding that the services provided by Contractor under this Contract will be purchased or renewed by the City under a new contract following expiration or termination of this Contract, and waives all rights or claims to notice or hearing respecting any failure by City to continue the purchase of all or any failure to continue purchase of all or any such services from Contractor.
32. Claims. Any claim by Contractor against City hereunder shall be subject to Government Code §§ 800 et seq. The claims presentation provisions of said Act are hereby modified such that the presentation of all claims hereunder to the City shall be waived if not made within six months after accrual of the cause of action.
33. Interpretation. This Contract shall be interpreted as if drafted by both parties.
34. Warranty. In the event that any product shall be provided to the City as part of this Contract, Contractor warrants as follows: Contractor possesses good title to the product and the right to transfer the product to City; the product shall be delivered to the City free from any security interest or other lien; the product meets any specifications contained herein; the product shall be free from material defects in materials and workmanship under normal use for a period of one (1) year from the date of delivery; and the product shall be fit for its intended purpose(s). Notwithstanding the foregoing, consumable and maintenance items (such as light bulbs and batteries) shall be warranted for a period of one hundred and eighty (180) days from the date of delivery. All repairs during the warranty period shall be promptly performed by Contractor, at Contractor's expense, including shipping.
35. Severability. In the event that any of the provisions or portions or applications thereof of this Contract are held to be unenforceable or invalid by any court of competent jurisdiction, City and Contractor shall negotiate an equitable adjustment in the provisions of the Contract with a view

toward effecting the purpose of this Contract, and the validity and enforceability of the remaining provisions or portions or applications thereof, shall not be affected thereby.

36. Authority. City warrants and represents that the signatory hereto (the Mayor of the City of Richmond or the City Manager) is duly authorized to enter into and execute this Contract on behalf of City. The party signing on behalf of Contractor warrants and represents that he or she is duly authorized to enter into and execute this Contract on behalf of Contractor, and shall be personally liable to City if he or she is not duly authorized to enter into and execute this Contract on behalf of Contractor.
37. Waiver. The waiver by City of any breach of any term or provision of this Contract shall not be construed as a waiver of any subsequent breach. Inspections or approvals, or statements by any officer, agent or employee of the City relating to the Contractor's performance, or payments therefore, or any combination of these acts, shall not relieve the Contractor's obligation to fulfill this Contract as prescribed; nor shall the City be thereby stopped from bringing any action for damages or enforcement arising from any failure to comply with any of the terms and conditions of this Contract.
38. Possessory Interest. If this Contract results in the Contractor having possession of, claim to or right to the possession of land or improvements, but does not vest ownership of the land or improvements in the same person, or if this Contract results in the placement of taxable improvements on tax exempt land (Revenue and Taxation Code 107), such interest or improvements may represent a possessory interest subject to property tax, and Contractor may be subject to the payment of property taxes levied on such interest.
39. Performance and Final Acceptance.
- Contractor represents that it is experienced, qualified, registered, licensed, equipped, organized and financed to perform the services under this Contract.
- Contractor shall perform the services under this Contract with that degree of skill and judgment normally exercised by professional firms performing services of a similar nature in the State of California, and shall be responsible for the professional quality, technical accuracy and coordination of the services it performs under this Contract. In addition to the other rights and remedies which City may have, Contractor shall, at its own expense, correct any services which fail to meet the above standard.

City shall provide Contractor an opportunity to cure errors and omission which may be disclosed during the review of submittals, with no increase in the authorized Contract Payment Limit. Should Contractor fail to make necessary corrections in a timely manner, such corrections shall be made by the City and the cost thereof shall be charged to Contractor.

If warranted, City shall determine, and Contractor may request such determination, that Contractor has satisfactorily completed performance of this Contract. Upon such determination, City shall issue to Contractor a written Notice of Final Acceptance, after which Contractor shall not incur further costs under this Contract. Contractor shall respond to such Notice of Final Acceptance by executing and submitting to City a Release and . Certificate of Final Payment.

40. Survival. The rights and obligations of the parties which by their nature survive termination or completion of the services covered by this Contract shall remain in full force and effect after termination or completion.

For the Contract between the City of  
Richmond and  
Northern Consulting Actuaries, Inc. DBA Van  
Iwaarden Assoc.

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**EXHIBIT E**  
**SPECIAL CONDITIONS**

The General Conditions are hereby amended to include the following modifications and/or provisions (if applicable):

The City of Richmond has the option to extend this contract for up to two (2) additional one-year terms.

See attachment B for Background and project summary for scope of work.

See attachment F Cost information for fee quote per staff member.

## B. Background and Project Summary

This section describes our understanding of the City, the work to be done, and the objectives to be accomplished. We have worked closely with the City on your retirement plans for the past 5 years and are very familiar with the them. These include:

- Garfield Pension Plan
- General Pension Plan
- Police & Fire Pension Plan
- City Retiree Healthcare Plan
- RPOA Retiree Healthcare Plan

The table below summarizes the RFP Scope of Services and provides answers to how we'll provide the City with **professional services and dedicated personnel** to perform the requested projects.

What the City is Requesting	What We Will Do
Analyze the data to assess any inconsistencies and make recommendations for enhancing data quality	This is part of our standard actuarial valuation and reporting process. We've worked with the City's pension and OPEB data for several years and are familiar with its content and format.
<p>Prepare actuarial valuation reports every year for General Pension, Garfield Pension, Police and Fire Pension Plans that follow GASB 67/68 standards, and City OPEB and RPOA OPEB Plans that follow GASB 74/75 standards, to include the following:</p> <ul style="list-style-type: none"> <li>▪ Actuarial present value of total projected benefits.</li> <li>▪ Actuarial accrued liability</li> <li>▪ Actuarial value of assets</li> <li>▪ Unfunded actuarial accrued liability</li> <li>▪ Normal cost</li> <li>▪ Annual required contributions of the employer as a level dollar amount and as a level percentage of covered payrolls</li> <li>▪ Net pension and OPEB obligation for City disclosure under GASB 67/68 and 74/75</li> </ul>	<p>All of these GASB 67/68 and GASB 74/75 requirements are part of our standard actuarial valuation and reporting process. We've demonstrated over the past several years that our reports for the City contain all of the requested information.</p> <p><b>We prepare separate actuarial funding reports to determine the Actuarially Determined Contributions (ADC's) for all of the pension plans.</b> Results are expressed as a level dollar amount since there is no active employee payroll for these plans.</p> <p>We have also helped the City prepare actuarial contribution amounts for the City and RPOA OPEB plans. These results are expressed as a level percent of payroll and dollar amount.</p>
Prepare the necessary material for the Comprehensive Annual Financial Report (CAFR) to comply with GASB pension and OPEB reporting and disclosure requirements.	The City has used our actuarial reports for GASB reporting since 2015. All of our GASB 67/68 and GASB 74/75 reports contain the necessary information for your CAFR.

## B. Background and Project Summary *(continued)*

What the City is Requesting	What We Will Do
Prepare an analysis to determine how establishing a trust or equivalent arrangement would affect the interest rate assumption. Timing considerations of establishing the trust should also be considered.	All the City's plans have established trusts. We previously worked with the City on establishing a separate trust for the RPOA OPEB plan and are glad to provide additional analyses upon request.
Prepare a cash flow analysis (the "pay-as-you-go-cost").	Our pension and OPEB reports will include a 30-year projection of paygo benefit payouts for current and future retirees.
Prepare a sensitivity analysis showing the impact of alternative assumptions on the employer's contributions (healthcare trend rates and investment rate assumptions).	Our pension and OPEB reports all show a 1% increase and decrease in discount rate (investment return). Plus, our OPEB reports show the effect of a 1% change in healthcare trend rates.
If there is not a trust established, determine the difference in liability based upon the investment returns under a diversified portfolio versus a short term fixed income portfolio.	All the City's plans have established trusts. Our GASB and funding reports show the plan liability amounts calculated using the applicable interest rates: fixed income, diversified investment portfolio, or a combination thereof.
Provide strategies for funding and reducing costs.	<p>We're happy to discuss funding and cost reduction strategies upon request.</p> <p><b>One option the City should consider is no longer preparing separate actuarial funding reports for the Garfield and General pension plans.</b> These plans are extremely mature and we believe it's reasonable to switch to the "paygo" method once trust assets are depleted. The pension paygo costs may actually be more stable than the actuarial contribution rates.</p>

## B. Background and Project Summary *(continued)*

What the City is Requesting	What We Will Do
Discuss administrative draft of the report with City personnel at City location.  Present final report at regularly scheduled City Council meeting.	An annual meeting or videoconference with City staff or the City Council are included in our quote. We are glad to have additional calls or meetings upon request.  Preparation and additional meetings are billed at our regular hourly rates or for an agreed upon fixed fee.
City valuation report date will be the beginning of the fiscal year in July.	We will continue preparing the City's July 1 <sup>st</sup> actuarial valuations.
Assist City Staff with miscellaneous analyses as needed for various projects.	We're happy to provide additional analyses upon request. Special projects we've previously helped the City with include the Pension Tax Override calculations and establishment of the RPOA OPEB trust.

The Scope of Services also specifies criteria for the **Project Approach**. The table below summarizes the requirements and our responses.

What the City is Requesting	What We Will Do
Conduct initial discussions with the City to develop an in-depth understanding of its post-retirement health care plan in order to learn about data availability, management information system capabilities and to discuss specific issues the City would like to address during the review	Our initial contract with the City in 2015 included a "kick off" meeting where we met with City staff to better understand your plans.  <b>Since there are many new City staff members working on the pension and OPEB plans now, we would be glad to have a kick-off videoconference meeting to start the new contract.</b> This meeting would allow us to inform new staff members about how the actuarial valuation process works and address any questions the City may have.
Submit written data requests to the City (email is acceptable)	Our data request templates have been reviewed and used by the City since 2015. <b>For data security purposes, we also require all sensitive data be submitted through a secure file transfer system.</b>

**B. Background and Project Summary (continued)**

What the City is Requesting	What We Will Do
Gather and compile data provided by the City and review for reasonableness. Anomalies (if any) would be identified and clarified as appropriate.	<p>We have worked with the City's pension and OPEB data for several years and are familiar with its details. We will continue our reasonableness reviews and anomaly resolutions as part of the annual valuation process.</p> <p>We are also glad to help newer City staff better understand the data collection process so that they can maintain consistent data collection procedures.</p>

These items are all part of our standard actuarial valuation and reporting process. Please see Section C for more details on the methodology

## F. Cost Information

Our experience and knowledge leadership ensure that you will get superior advice at a reasonable cost. Our proposed fees for the FY2020-21 valuations are summarized in the table below. *We also include the estimated FY2021-22 valuation fees so that the City understands what total fees would look like over a full 2-year valuation cycle.*

As the City reviews the proposed fees, please consider carefully that they are based on whether “full” or “roll-forward” valuations are required in a particular year.<sup>4</sup>

Actuarial Deliverable	Proposed Fees	
	FY2020-21	FY2021-22
<b>Retiree Healthcare Plan – City Plan</b>		
FY2020-21 GASB 74/75 report <i>(roll forward valuation)</i>	\$3,500	
FY2021-22 GASB 74/75 report <i>(full valuation)</i>		\$15,000
<b>Retiree Healthcare Plan – RPOA Plan</b>		
FY2020-21 GASB 74/75 report <i>(roll forward valuation)</i>	3,000	
FY2021-22 GASB 74/75 report <i>(full valuation)</i>		8,000
<b>Garfield Pension Plan</b>		
Funding valuation for actuarial contributions <i>(full valuation)</i>	3,000	
GASB 67/68 accounting valuation	2,500	2,500
<b>General Pension Plan</b>		
Funding valuation for actuarial contributions <i>(full valuation)</i>	4,000	
GASB 67/68 accounting valuation	2,500	2,500
<b>Police &amp; Firemen’s Pension Fund</b>		
Funding valuation for actuarial contributions <i>(full valuation)</i>	5,000	
GASB 67/68 accounting valuation	2,500	2,500
<b>Total</b>	<b>\$26,000</b>	<b>\$30,500</b>

**Meetings:** Our quote includes one complimentary annual meeting or videoconference to review valuation results with City staff and/or City Council.

**Budgeting Option:** A significant portion of the funding valuation fees for the Garfield and General pension plans could be eliminated if the City accepts our recommendation to stop preparing these reports (see Background and Project Summary section for additional details).

<sup>4</sup> “Full” actuarial valuations will cost more than roll-forward valuations because the latter do not require new census data collection, programming, and assumption updates.

### F. Cost Information (continued)

Below are tables illustrating the estimated hours and hourly rates expected for the FY2020-21 and FY2021-22 actuarial valuation projects and proposed fees.

FY2020-21 Estimated Hours and Hourly Rates				
Staff Member	Staff Hours	Hourly Rate	Direct Cost	Total Cost (round to near \$100)
Gina Ganab ASA, MAAA	25	\$305	\$ 7,625	\$ 7,600
Mark Schulte FSA, EA, MAAA	10	375	3,750	3,700
Emily Erickson	24	195	4,680	4,700
Other actuarial analysts	80	125	10,000	10,000
<b>Total</b>	<b>139</b>			<b>\$ 26,000</b>

FY2021-22 Estimated Hours and Hourly Rates				
Staff Member	Staff Hours	Hourly Rate	Direct Cost	Total Cost (round to near \$100)
Gina Ganab ASA, MAAA	25	\$305	\$ 7,625	\$ 7,600
Mark Schulte FSA, EA, MAAA	15	375	5,625	5,600
Emily Erickson	40	195	7,800	7,800
Other actuarial analysts	76	125	9,500	9,500
<b>Total</b>	<b>156</b>			<b>\$ 30,500</b>

We highly recommend that the City include a budget in the actuarial contract for additional consulting projects. These might include pension tax override calculations, CalPERS pension cost projections, OPEB plan design analyses, or other projects.

Out-of-scope projects are within the City's control, and they will be billed at our normal hourly rates or as not-to-exceed fees under a contract amendment. Our 2020-21 hourly rates are summarized in the table below.

Actuary	Role	2020-21 Hourly Rate
Gina Ganab ASA, MAAA	Consulting Actuary	\$305
Mark Schulte FSA, EA, MAAA	Consulting Actuary	\$375
Emily Erickson	Actuarial Manager	\$195
Other actuarial analysts	Actuarial Analysts	\$95-155

We will notify you if any out-of-scope fees are to apply, and we will be happy to estimate fees for additional projects as requested.

For the Contract between the City of  
Richmond and  
Northern Consulting Actuaries, Inc. DBA Van  
Iwaarden Assoc.

**EXHIBIT F**  
**INSURANCE PROVISIONS**

During the entire term of this Contract and any extension or modification thereof, the CONTRACTOR shall keep in effect insurance policies meeting the insurance requirements specified in the insurance provisions which are attached hereto and incorporated herein by this reference.

\_\_\_ Exhibit F

\_\_\_ Section 8

## City of Richmond - Insurance Requirements - Type 2: Professional Services

In all instances where CONTRACTOR or its representatives will provide professional services (*architects, engineers, construction management, counselors, medical professionals, hospitals, clinics, attorneys, consultants, accountants, etc.*) to the City of Richmond (City), the City requires the following MINIMUM insurance requirements and limits.

CONTRACTOR shall procure and maintain for the duration of the contract, agreement, or other order for work, services or supplies, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder and the results of that work by the CONTRACTOR, its agents, representatives, employees or subcontractors. **Maintenance of proper insurance coverage is a material element of the contract. Failure to maintain or renew coverage or to provide evidence of renewal may be treated by the City as a material breach of contract.**

CONTRACTOR agrees that in the event of loss due to any of the perils for which it has agreed to provide Commercial General Liability insurance, CONTRACTOR shall look solely to its insurance for recovery. CONTRACTOR hereby grants to CITY, on behalf of any insurer providing Commercial General Liability insurance to either CONTRACTOR or CITY with respect to the services of CONSULTANT herein, a waiver of any right to subrogation which any such insurer of said CONTRACTOR may acquire against the CITY by virtue of the payment of any loss under such insurance.

Original, signed certificates and original, separate policy endorsements, naming the City as an additional insured for general liability coverage, as well as a waiver of subrogation for Workers' Compensation insurance, shall be received and approved by the City **before any work may begin**. However, failure to do so shall not operate as a waiver of these insurance requirements.

City reserves the right to modify or require additional coverages for specific risk exposures depending on scope of CONTRACTORS work.

Minimum coverage is detailed below. The policy limits of coverage shall be made available to the full limits of the policy. The minimum limits stated herein shall not serve to reduce the policy limits of coverage of CONTRACTOR.

**Minimum Scope of Insurance** – the following forms shall be provided and coverage shall be at least as broad as the following:

1. Insurance Services Office Commercial General Liability coverage (ISO Occurrence Form CG 0001), and including coverage for bodily and personal injury, property damage, and products and completed operations (if applicable).
2. Insurance Services Office Automobile Liability coverage (ISO Form CA 0001, Code 1, Any Auto).
3. Original and Separate Additional Insured Endorsement for General Liability (ISO Form CG 20 10 11/85 or its equivalent) with primary and non-contributory language.
4. Workers' Compensation Insurance as required by the State of California including Employer's Liability coverage.
5. Original and Separate Waiver of Subrogation for Workers' Compensation insurance.
6. Professional Liability or Errors & Omissions Liability Insurance appropriate to the CONTRACTOR's profession (if required.)

Required Coverage	Minimum Limits
Workers' Compensation and Employers' Liability	Statutory limits as required by the State of California including \$1 million Employers' Liability per accident, per employee for bodily injury or disease. If CONTRACTOR is self-insured, provide a certificate of Permission to Self-Insure, signed by the California Department of Industrial Relations and Self-Insurance. If contractor is a sole proprietor (has no employees) than contractor must sign "Contractor Release of Liability" found at: <a href="http://www.ci.richmond.ca.us/index.aspx?nid=61">http://www.ci.richmond.ca.us/index.aspx?nid=61</a> .
General Liability (primary and excess limits combined)	<b>\$2,000,000</b> per occurrence for bodily injury, personal injury and property damage. If the policy includes a general aggregate, either the general aggregate shall apply separately to this project, service or location or the <b>minimum required aggregate limit shall be twice the per occurrence limit (\$4 million aggregate limit)</b> .  Policy shall be endorsed to name the City of Richmond as an additional insured per the conditions detailed below.

\_\_\_ Exhibit F

\_\_\_ Section 8

### City of Richmond - Insurance Requirements - Type 2: Professional Services

Automobile Liability	\$1,000,000 per occurrence for bodily injury and property damage.	
Professional Liability or Errors & Omissions Liability – <i>Required for all professionals including architects, engineers, consultants, construction management, counselors, medical professionals, hospitals, clinics, attorneys and accountants, &amp; other consultants as may be required by the City.</i>	<b>PROJECT COST</b>	<b>REQUIRED LIMIT</b>
	\$0 - \$1 million	\$1 million p/o
	\$1 million - \$5 million	\$2 million p/o
	Over \$5 million	\$5 million p/o

#### Required Policy Conditions

Additional Insured Endorsement	<p>Applicable to General Liability coverage.</p> <p>The City of Richmond, its officers, officials, employees, agents and volunteers are to be named as additional insureds for all liability arising out of the operations by or on behalf of the named insured including bodily injury, deaths and property damage or destruction arising in any respect directly or indirectly in the performance of this contract.</p> <p><b>ISO form CG 20 10 (11/85) or its equivalent is required. If the Contractor is supplying their product or providing a service then the endorsement <u>must not</u> exclude products and completed operations coverage. If it does, then CG 20 37 (10/01) is also required. SAMPLE Endorsements can be found at <a href="http://www.ci.richmond.ca.us/index.aspx?nid=61">http://www.ci.richmond.ca.us/index.aspx?nid=61</a>.</b></p>
Primary and Noncontributory	<p>The contractor's insurance coverage must be primary coverage as it pertains to the City, its officers, officials, employees, agents and volunteers. Any insurance or self insurance maintained by the City is wholly separate from the insurance of the contractor and in no way relieves the contractor from its responsibility to provide insurance.</p>
Waiver of Subrogation Endorsement Form	<p>Contractor's insurer will provide a Waiver of Subrogation in favor of the City for Workers' Compensation Insurance during the life of this contract. SAMPLE Endorsements can be found at <a href="http://www.ci.richmond.ca.us/index.aspx?nid=61">http://www.ci.richmond.ca.us/index.aspx?nid=61</a>.</p>
Deductibles and Self-Insured Retentions	<p>Any deductible or self-insured retention must be declared to and approved by the City. At the option of the City either the insurer shall reduce or eliminate such deductibles or self-insured retention as respects the City or the CONTRACTOR shall procure a financial guarantee in an amount equal to the deductible or self-insured retention guaranteeing payment of losses and related investigations, claims administration and defense expenses. Contractor is responsible for satisfaction of the deductible and/or self-insured retention for each loss.</p>
A. M. Best Rating	<p>A:VII or Better. If the A.M. Best Rating falls below the required rating, CONTRACTOR must replace coverage immediately and provide notice to City.</p>

#### Umbrella/Excess Liability Policies

If an Umbrella or Excess Liability Policy is used to meet the liability limits, coverage shall be as broad as specified for underlying coverage's and cover those insured in the underlying policies.

Illinois Operations Center

2702 Ireland Grove Road  
Bloomington, IL 61709-0001AT2 000328 1200 01  
CITY OF RICHMOND  
450 CIVIC CENTER PLAZA  
RICHMOND CA 94804-1630State Farm Fire and Casualty Company  
A stock company with home offices in Bloomington, IllinoisST-  
0105-0000

## Renewal Declarations

Policy number: 93-ED-D044-9

Policy period: 12 months

The policy period begins and ends at 12:01 am standard time at the premises location.

Effective date: January 1, 2021

Expiration date: January 1, 2022

### OFFICE POLICY

**Automatic renewal** - If the State Farm® policy period is shown as **12 months**, this policy will be renewed automatically subject to the premiums, rules and forms in effect for each succeeding policy period. If this policy is terminated, we will give you and the Mortgagee/Lienholder written notice in compliance with the policy provisions or as required by law.

### NAMED INSURED

NORTHERN CONSULTING ACTUARIES  
100 S 5TH ST STE 1900  
MINNEAPOLIS MN 55402-1267

### ENTITY

Corporation

### IMPORTANT MESSAGE(S)

To obtain a copy of your policy, please contact your State Farm Agent.

### POLICY PREMIUM

**This is not a bill.** If an amount is due, then a separate statement will be sent prior to the due date. The premium(s) shown below is the 12 months premium(s) for the characteristics of the policy as described in this Declarations.

MN Fire Safety Schg: \$2.98

Minnesota Firefighters Relief Surcharge: \$2.81

Total Premium: \$827.79

### Discounts applied:

Business Experience Rating

Protective Devices

Enclosed Building or Shopping Center

Renewal Discount

Years in Business

RECEIVED  
CITY OF RICHMOND

NOV 20 2020

HUMAN RESOURCES  
MANAGEMENT DEPT.Policy Number: 93-ED-D044-9  
Prepared: November 9, 2020

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Page 1 of 5

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CMP-4000

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<b>City of Richmond - Insurance Requirements - Type 2: Professional Services</b>
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**Claims-Made Policies**

If any insurance policy is written on a claims-made form: 1) the retroactive date must be shown, and must be before the date of the contract or the beginning of contract work. 2) Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of the contract of work. 3) If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a retroactive date prior to the contract effective date, the Contractor must purchase an extended period coverage for a minimum of five (5) years after completion of contract work.

**Subcontractors**

CONTRACTOR shall include all subcontractors as insured under its policies or shall furnish to the City for review and approval, separate certificates and endorsements for each subcontractor. All coverage for subcontractors shall be subject to all of the requirements stated herein.

CONTRACTOR agrees to defend and indemnify the City of Richmond for any damage resulting to it from failure of either CONTRACTOR or any subcontractor to take out or maintain the required insurance policies. The fact that insurance is obtained by CONTRACTOR, and/or CONTRACTOR's subcontractors, will not be deemed to release or diminish the liability of CONTRACTOR, including, without limitation, liability under the indemnity provisions of this contract. Damages recoverable by CITY from CONTRACTOR or any third party will not be limited by the amount of the required insurance coverage.

**Verification of Coverage**

All original certificates and endorsements shall be received and approved by the City before work may begin. The City of Richmond reserves the right to require complete, certified copies of all required insurance policies including endorsements affecting the coverage at any time.

**Original insurance certificates and required policy endorsements shall be mailed or delivered to the Designated Project Manager for the City of Richmond.**

Insurance certificates and endorsements may be faxed to the Designated Project Manager. However, CONTRACTOR must mail the original certificates and endorsements to Designated Project Manager once faxed.

**Continuous Coverage**

CONTRACTOR shall maintain the required insurance for the life of the contract. Should the CONTRACTOR cease to have insurance as required during this time, all work by the CONTRACTOR pursuant to this agreement shall cease until insurance acceptable to the City is provided. In the event that CONTRACTOR fails to comply with the City's insurance requirements, the City may take such action as it deems necessary to protect the City's interests. Such action may include but is not limited to termination of the contract, withholding of payments, or other actions as the City deems appropriate.

If services or the scope of work extend beyond the expiration dates of the required insurance policies initially approved by the City, CONTRACTOR must provide updated certificates and endorsements indicating that the required coverage, terms and conditions are still in place. **Renewal certificates and updated endorsements shall be mailed to the Designated Project Manager.**

**Cancellation**

CONTRACTOR shall ensure that coverage shall not be cancelled, reduced or otherwise materially changed except after thirty (30) days' prior written notice has been given to the City.


**Reporting Requirements**

Any failure to comply with reporting or other provisions of the policies including breaches of warranties shall not affect coverage provided to the City, its officers, officials, employees or volunteers.

**Consistent with Public Policy**

The insuring provisions, insofar as they may be judged to be against public policy shall be void and unenforceable only to the minimum extent necessary so that the remaining terms and provisions herein may be consistent with public policy and thus enforceable.

Illinois Operations Center

2702 Ireland Grove Road  
Bloomington, IL 61709-0001

 AT2 000328 1200 01  
CITY OF RICHMOND  
450 CIVIC CENTER PLAZA  
RICHMOND CA 94804-1630

 State Farm Fire and Casualty Company  
A stock company with home offices in Bloomington, Illinois

ST-0105-0000



## Renewal Declarations

Policy number: 93-ED-D044-9

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The policy period begins and ends at 12:01 am standard time at the premises location.

Effective date: January 1, 2021

Expiration date: January 1, 2022

### OFFICE POLICY

**Automatic renewal** - If the State Farm® policy period is shown as **12 months**, this policy will be renewed automatically subject to the premiums, rules and forms in effect for each succeeding policy period. If this policy is terminated, we will give you and the Mortgagee/Lienholder written notice in compliance with the policy provisions or as required by law.

### NAMED INSURED

 NORTHERN CONSULTING ACTUARIES  
100 S 5TH ST STE 1900  
MINNEAPOLIS MN 55402-1267

### ENTITY

Corporation

### IMPORTANT MESSAGE(S)

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### POLICY PREMIUM

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Total Premium: \$827.79

### Discounts applied:

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Enclosed Building or Shopping Center

Renewal Discount

Years in Business

RECEIVED  
CITY OF RICHMOND

NOV 20 2020

HUMAN RESOURCES  
MANAGEMENT DEPT.



## SECTION I - PROPERTY SCHEDULE

Location number	Location of described premises	Limit of Insurance* Coverage A - Building	Limit of Insurance* Coverage B - Business Personal Property	Seasonal Increase - Business Personal Property
001	840 LUMBER EXCHANGE BUILDING 10 S 5TH ST MINNEAPOLIS MN 55402-1012	No Coverage	\$61,500	25%

\* As of the effective date of this policy, the Limit of Insurance as shown includes any increase in the limit due to Inflation Coverage.

## SECTION I - INFLATION COVERAGE INDEX(ES)

Cov A - Inflation Coverage Index:	N/A
Cov B - Consumer Price Index:	259.9

## SECTION I - DEDUCTIBLES

BASIC DEDUCTIBLE \$500

### SPECIAL DEDUCTIBLES:

Employee Dishonesty:	\$250
Equipment Breakdown:	\$500
Money and Securities:	\$250

Other deductibles may apply - refer to policy.

## SECTION I - EXTENSIONS OF COVERAGE - LIMIT OF INSURANCE - EACH DESCRIBED PREMISES

The coverages and corresponding limits shown below apply separately to each described premises shown in these Declarations, unless indicated by "See schedule". If a coverage does not have a corresponding limit shown below, but has "Included" indicated, refer to that policy provision for an explanation of that coverage.

Coverage	Limit of Insurance
Accounts Receivable	
On Premises	\$50,000
Off Premises	\$15,000
Arson Reward	\$5,000
Back-up of Sewer or Drain	\$15,000
Collapse	Included
Damage to Non-owned Buildings from Theft, Burglary or Robbery	Coverage B Limit
Debris Removal	25% of covered loss
Equipment Breakdown	Included
Fire Department Service Charge	\$5,000
Fire Extinguisher Systems Recharge Expense	\$5,000
Forgery or Alteration	\$10,000



## SECTION I - PROPERTY SCHEDULE

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## SECTION I - DEDUCTIBLES

**BASIC DEDUCTIBLE** \$500

### SPECIAL DEDUCTIBLES:

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Other deductibles may apply - refer to policy.

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Off Premises	\$15,000
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Collapse	Included
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Debris Removal	25% of covered loss
Equipment Breakdown	Included
Fire Department Service Charge	\$5,000
Fire Extinguisher Systems Recharge Expense	\$5,000
Forgery or Alteration	\$10,000



ST-0205-0000

Coverage	Limit of Insurance
Glass Expenses	Included
Money Orders and Counterfeit Money	\$1,000
Money and Securities	
On Premises	\$10,000
Off Premises	\$5,000
Newly Acquired Business Personal Property (applies only if this policy provides Coverage B - Business Personal Property)	\$100,000
Newly Acquired or Constructed Buildings (applies only if this policy provides Coverage A - Buildings)	\$250,000
Ordinance or Law - Equipment Coverage	Included
Outdoor Property	\$5,000
Personal Effects (applies only to those premises provided Coverage B - Business Personal Property)	\$5,000
Personal Property Off Premises	\$15,000
Pollutant Clean Up and Removal	\$10,000
Preservation of Property	30 days
Property of Others (applies only to those premises provided Coverage B - Business Personal Property)	\$2,500
Signs	\$2,500
Unauthorized Business Card Use	\$5,000
Valuable Papers and Records	
On Premises	\$50,000
Off Premises	\$15,000
Water Damage, Other Liquids, Powder or Molten Material Damage	Included

**SECTION I - EXTENSIONS OF COVERAGE - LIMIT OF INSURANCE - PER POLICY**

The coverages and corresponding limits shown below are the most we will pay regardless of the number of described premises shown in these Declarations.

Coverage	Limit of Insurance
Dependent Property - Loss of Income	\$5,000
Employee Dishonesty	\$10,000
Loss of Income and Extra Expense	12 Months Actual Loss Sustained
Utility Interruption - Loss of Income	\$10,000



## SECTION II - LOCATION SCHEDULE

Location number	Location of described premises
001	840 LUMBER EXCHANGE BUILDING 10 S 5TH ST MINNEAPOLIS MN 55402-1012

## SECTION II - LIABILITY

Coverage	Limit of Insurance
Coverage L - Business Liability Per Occurrence	\$2,000,000
Coverage M - Medical Expenses	\$5,000 Any One Person
Damage to Premises Rented to You	\$300,000
Hired Auto Liability	Included in Coverage L
Aggregate Limits	Limit of Insurance
Products/Completed Operations Aggregate	\$4,000,000
General Aggregate	\$4,000,000

Each paid claim for Liability Coverage reduces the amount of insurance we provide during the applicable annual period. Please refer to Section II – Liability in the Coverage Form and any attached endorsements.

Your policy consists of these Declarations, the BUSINESSOWNERS COVERAGE FORM shown below, and any other forms and endorsements that apply, including those shown below as well as those issued subsequent to the issuance of this policy.

## FORMS AND ENDORSEMENTS

553-2795 MN	Fire Safety Surcharge
CMP-4100	Businessowners Coverage Form
CMP-4223.1	Amendatory Endorsement (Minnesota)
* CMP-4536	Additional Insured - Owners, Lessees or Contractors (Scheduled)
* CMP-4538	Additional Insured - Designated Premises
CMP-4561.1	Policy Endorsement
CMP-4703.1	Utility Interruption - Loss of Income
CMP-4704.1	Dependent Property - Loss of Income
CMP-4705.2	Loss of Income and Extra Expense
CMP-4709	Money and Securities
CMP-4710	Employee Dishonesty
CMP-4746.1	Hired Auto Liability
* CMP-4785.1	Additional Insured - Owners, Lessees or Contractors (Blanket)
CMP-4787	Waiver of Transfer of Rights of Recovery Against Others To Us
CMP-4788	Additional Insured - Managers or Lessors of Premises
CMP-4819.1	Unauthorized Business Card Use
CMP-4899	Back-up of Sewer or Drain
FD-6007	Inland Marine Attaching Declarations
FE-3650	Actual Cash Value Endorsement
* FE-6999.3	Policyholder Disclosure Notice of Terrorism Insurance Coverage
	<i>*New Form Attached</i>

**SCHEDULE OF ADDITIONAL INTEREST(S)**

Interest type: Owners, Lessees, or Contractors (Schedule)  
 Endorsement number: CMP-4536  
 Loan number: N/A  
 CITY OF RICHMOND  
 450 Civic Center Plaza  
 Richmond CA 94804-1630

ST-0305-0000

**FULL NAMED INSURED**

**Named Insured:** NORTHERN CONSULTING ACTUARIES DBA VAN IWAARDEN ASSOCIATES

This policy is issued by the State Farm Fire and Casualty Company.

**PARTICIPATING POLICY**

You are entitled to participate in a distribution of the earnings of the company as determined by our Board of Directors in accordance with the Company's Articles of Incorporation, as amended.

In Witness Whereof, the State Farm Fire and Casualty Company has caused this policy to be signed by its President and Secretary at Bloomington, Illinois.

President

Secretary

**NOTICE TO POLICYHOLDER:**

For a comprehensive description of coverage and forms, please refer to your policy.

Policy changes requested before the "Date Prepared", which appear on this notice, are effective on the Renewal Date of this policy unless otherwise indicated by a separate endorsement, binder, or amended declarations. Any coverage forms attached to this notice are also effective on the Renewal Date of this policy.

Policy changes requested after the "Date Prepared" will be sent to you as an amended declarations or as an endorsement to your policy. Billing for any additional premium for such changes will be mailed at a later date.

If, during the past year, you've acquired any valuable property items, made any improvements to insured property, or have any questions about your insurance coverage, contact your State Farm agent.

Please keep this with your policy.

**Your coverage amount....**

It is up to you to choose the coverage and limits that meet your needs. We recommend that you purchase a coverage limit equal to the estimated replacement cost of your structure. Replacement cost estimates are available from building contractors and replacement cost appraisers, or, your agent can provide an estimate from Xactware, Inc. using information you provide about your structure. State Farm does not guarantee that any estimate will be the actual future cost to rebuild your structure. Higher limits are available at higher premiums. Lower limits are also available, as long as the amount of coverage meets our underwriting requirements. We encourage you to periodically review your coverages and limits with your agent and to notify us of any changes or additions to your structure.

Illinois Operations Center

2702 Ireland Grove Road  
Bloomington, IL 61709-0001CITY OF RICHMOND  
450 CIVIC CENTER PLAZA  
RICHMOND CA 94804-1630State Farm Fire and Casualty Company  
A stock company with home offices in Bloomington, IllinoisST-  
0405-0000

## Inland Marine Attaching Declarations

Policy number: 93-ED-D044-9

Policy period: 12 months

The policy period begins and ends at 12:01 am standard time at the premises location.

Effective date: January 1, 2021

Expiration date: January 1, 2022

### ATTACHING INLAND MARINE

**Automatic renewal** - If the State Farm® policy period is shown as **12 months**, this policy will be renewed automatically subject to the premiums, rules and forms in effect for each succeeding policy period. If this policy is terminated, we will give you and the Mortgagee/Lienholder written notice in compliance with the policy provisions or as required by law.

**Annual policy premium:** Included

The above premium amount is included in the Policy Premium shown on the Declarations.

### FULL NAMED INSURED

**Named Insured:** NORTHERN CONSULTING ACTUARIES DBA VAN IWAARDEN ASSOCIATES

Your policy consists of these Declarations, the INLAND MARINE CONDITIONS shown below, and any other forms and endorsements that apply, including those shown below as well as those issued subsequent to the issuance of this policy.

### FORMS, OPTIONS AND ENDORSEMENTS

FE-8739	Inland Marine Conditions
FE-8743.1	Inland Marine Computer Property Form
	See below for schedule page with limits

### ATTACHING INLAND MARINE SCHEDULE PAGE

Endorsement number	Coverage	Limit of insurance	Deductible amount	Annual premium
FE-8743.1	Inland Marine Computer Property Form	\$25,000	\$500	Included
	Loss of Income and Extra Expense	\$25,000		Included

Other limits and exclusions may apply - refer to your policy.

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.



## **ADDITIONAL INSURED — OWNERS, LESSEES, OR CONTRACTORS (Scheduled)**

This endorsement modifies insurance provided under the following:

BUSINESSOWNERS COVERAGE FORM

### **SCHEDULE**

**Policy Number:** 93-ED-D044-9

**Named Insured:**

NORTHERN CONSULTING ACTUARIES DBA VAN IWAARDEN ASSOCIATES

100 S 5TH ST STE 1900

MINNEAPOLIS MN 55402-1267

**Name And Address Of Additional Insured Person Or Organization:**

CITY OF RICHMOND ITS OFFICERS, OFFICIALS, EMPLOYEES, AND VOLUNTEERS

450 Civic Center Plaza

Richmond CA 94804-1630

1. SECTION II — WHO IS AN INSURED of SECTION II — LIABILITY is amended to include, as an additional insured, any person or organization shown in the Schedule, but only with respect to liability for "bodily injury", "property damage", or "personal and advertising injury" caused, in whole or in part, by:

**a. Ongoing Operations**

- (1) Your acts or omissions; or
- (2) The acts or omissions of those acting on your behalf;

in the performance of your ongoing operations for that additional insured; or

**b. Products-Completed Operations**

"Your work" performed for that additional insured and included in the "products-completed operations hazard".

2. Any insurance provided to the additional insured shall only apply with respect to a claim made or a "suit" brought for damages for which you are provided coverage.
3. Primary Insurance. The insurance afforded the additional insured shall be primary insurance. Any insurance carried by the additional insured shall be noncontributory with respect to coverage provided by you.

All other policy provisions apply.



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**CITY OF RICHMOND FINANCE DEPARTMENT**  
**REQUEST FOR PROPOSALS (RFP)**  
**OTHER POST-EMPLOYMENT BENEFITS ACTUARIAL SERVICES**

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**Today's Date:** May 29, 2020

**Closing Date and Time:** June 19, 2020 (by 4:00 p.m.)

**Contact Person:** Ofelia Alvarez, Senior Buyer  
Phone: 510-620-6699  
Email: Ofelia\_alvarez@ci.richmond.ca.us

## **1.0 INTRODUCTION**

### **1.1 Proposed Solicitation**

The City of Richmond, hereinafter referred to as the "City", is soliciting proposals for Other Post-Employment Benefits (OPEB) and Closed Pension Plans Actuarial Services. Qualified firms, hereafter referred to as "vendor(s)", which meet the requirements set forth in this Request for Proposal are encouraged to participate.

### **1.2 General Information about the City**

The City of Richmond is a full-service, chartered city, governed by a Council-Manager form of government. As of May 2020, the City employs approximately 636 full-time and 158 part-time employees. Incorporated in 1909, Richmond has a population of about 111,785. Encompassing approximately 56 square miles, Richmond is situated on a peninsula separating San Francisco Bay (on the south) and San Pablo Bay (to the north) spanning 32 total miles of shoreline. Richmond is located 16 miles northeast of San Francisco, in the Bay Area, in Contra Costa County. The state capitol, Sacramento, California is approximately 90 minutes to the east.

Effective June 30, 2018, the provisions of the Governmental Accounting Standards Board (GASB) Statement NO.75, Accounting and Financial Reporting for Postemployment Benefits Other than Pensions (OPEB) was adopted. The City currently has three closed Pension Plans – General Pension, Garfield Pension and Police & Fire Pension Plan governed by GASB statement 67/68 in which we need actuarial reports every year.

The City manages two separate Plans for OPEB. As of January 17, 2017 the Richmond Police Officers Association OPEB plan was adopted.

The City contributes to the California Public Employees' Retirement System (PERS), an agent multiple-employer public employee defined benefit pension plan that covers substantially all eligible City employees. PERS provides retirement and disability benefits, annual cost-of-living adjustments, and death benefits to plan members and beneficiaries. PERS acts as a common investment and administrative agent for participating public entities within the State of California.

The City established the Secured Pension Override Special Revenue Fund to which proceeds of a special incremental property tax levy voted by the citizens of the City of Richmond are credited for the payment of benefits under the Pension Plans.

In addition to the pension benefits described, the City provides post-retirement health care benefits, in accordance with City ordinances, to all employees who retire from the City on or after attaining retirement age (50 for policemen and firemen, 55 for all other employees) and who have at least ten years of service. In order to qualify for post-employment medical and Dental benefits, an employee must retire from the City and maintain enrollment in one of the City's eligible health plans.

## **1.2 General Information about the City (continued)**

At June 30, 2019, 564 retirees met those eligibility requirements. The City has funded these benefits on a pay-as-you-go basis and normal cost in some years. During the current fiscal year, expenditures of \$4,246,194 were recognized for post-employment health care benefits.

## **2.0 INSTRUCTIONS**

### **2.1 Purpose**

The purpose of the Request for Proposal (RFP) is to provide interested vendors the necessary information for preparing quotes for Actuarial Services that will meet the City's specific needs.

### **2.2 Term**

The term of the Agreement is one year. The City, may, at its option, extend the Agreement with the same or more limited scope of required services for up to two (2) additional one-year terms. Please note that the extension of the agreement beyond the initial one-year contract will also be contingent upon funding approval by the City Council.

## **3.0 PROPOSAL FORMAT GUIDELINES**

The proposal should be concise, well organized, and demonstrate the proposer's qualifications and experience applicable to the Project. The proposal shall be limited to 20 double-sided pages (8.5 inches x 11 inches), inclusive of graphics, forms, pictures, photographs, dividers, etcetera, but not of cost proposal, resumes, required forms, certifications, front and back covers, or letters of commitment from sub-consultants. The required font size is 12 point, with minimum left and right margins of one-inch, and top and bottom margins of 0.7 inches.

Each proposal will adhere to the following order and content of sections. Proposal should be straightforward, concise and provide "layman" explanations of technical terms that are used. Emphasis should be concentrated on conforming to the RFP instructions, responding to the RFP requirements, and on providing a complete and clear description

of the offer. Proposals, which appear unrealistic in the terms of technical commitments, lack of technical competence or are indicative of failure to comprehend the complexity and risk of this contract, may be rejected. The following proposal sections are to be included in the Vendor's response:

**A. Vendor Cover Letter**

A cover letter, not to exceed three pages in length, should summarize key elements of the proposal. An individual authorized to bind the company must sign the letter. The letter must stipulate that the proposal price will be valid for a period of at least 180 days. Indicate the address and telephone number of the vendor's office located nearest to Richmond, California and the office from which the project will be managed.

**B. Background and Project Summary Section**

The Background and Project Summary Section should describe your understanding of the City, the work to be done, and the objectives to be accomplished. Refer to scope of services for this RFP.

**C. Methodology Section**

Provide a detailed description of the approach and methodology to be used to accomplish the Scope of Services of this RFP. The Methodology Section should include:

- 1) An implementation plan that describes in detail (i) the methods, including controls by which your firm manages projects of the type sought by this RFP; (ii) methodology for soliciting and documenting views of internal and external stakeholders; (iii) and any other project management or implementation strategies or techniques that the respondent intends to employ in carrying out the work.
- 2) Detailed description of efforts your firm will undertake to achieve client satisfaction and to satisfy the requirements of the "Scope of Services" section.
- 3) Detailed project schedule, identifying all tasks and deliverables to be performed, durations for each task, and overall time of completion.
- 4) Detailed description of specific tasks you will require from City staff. Explain what the respective roles of City staff and your staff would be to complete the tasks specified in the Scope of Services.

**D. Staffing**

Describe proposed Project team organization, including identification and responsibilities of key personnel. Indicate role and responsibility of prime consultants and all sub-consultants. If applicable, indicate how local firms are being utilized to ensure a strong understanding of state and local laws, ordinances, regulations, policies, requirements, and permitting. Indicate the extent of the commitment of key personnel for the duration of the Project and

furnish resumes of key personnel. Provide an indication of the staffing level for the Project. The City of Richmond's evaluation of the proposal will consider the proposer's entire team; therefore, no changes in the team composition will be allowed without prior written approval of the City of Richmond. Sub-consultant letters of commitment are required and must be submitted with the proposal.

Describe the experience of the proposer's Project team in detail, including the team's Project Manager, and other key staff members, on projects of similar size, capacity, and dollar value. For each similar project, include the client's name and correct telephone number. It is the City of Richmond's policy to interview proposers' references as well as references identified by the City of Richmond.

#### **E. Qualifications**

The information requested in this section should describe the qualifications of the firm, key staff and sub-contractors performing projects within the past five years that are similar in size and scope to demonstrate competence to perform these services. Information shall include:

- 1) Names of key staff that participated on named projects and their specific responsibilities with respect to this scope of service.
- 2) A summary of your firm's demonstrated capability, including length of time that your firm has provided the services being requested in this Request for Proposal.
- 3) Provide at least three (3) references that received similar services from your firm. The City of Richmond reserves the right to contact any of the organizations or individuals listed. Information provided shall include:
  - a) Client Name and contact info
    - Telephone & e-mail address
    - Address
  - b) Description of services provided including contract amount
  - c) Project start and end dates

#### **F. Cost Information**

Provide the total direct and indirect costs to complete all tasks identified in the scope of services. Even if the method of payment to proposer will be fixed fee, a detailed cost breakdown shall be provided identifying: (1) the number of staff hours and hourly rates for each professional and administrative staff person who will be committed to this Project; (2) all other direct costs, such as materials and reproduction costs; and (3) sub-consultant services, if needed. These rates will also be used to negotiate rates for other projects (including optional tasks) that may be assigned. No additional funds will be paid above and beyond the original quote given by the selected Vendor.

Proposers will be paid at the same rates set forth in their cost proposal unless further negotiated in writing and agreed to by the City of Richmond.

#### **G. Previous Contracts with the City of Richmond**

The proposer shall submit a list which indicates all prime contracts and/or amendments awarded to the proposer by the City of Richmond for the last three (3) years. The list shall include a short description of the Project, the Project scope of work, award date, completion date, name of City of Richmond's assigned Project Manager, and contract value.

#### **H. Exceptions to this Request for Proposals**

The proposer shall state whether or not it takes exception(s) to this RFP, including but not limited to the City of Richmond's Standard Services Agreement – RFP (Attachment 1). If the proposer does take exception(s) to any portion of the RFP or contract, the specific portion to which exception(s) is taken must be identified by section number and explained. Requests for changes or additions to sections of City of Richmond's Standard Services Agreement must be shown by requesting deletion of specific words and/or by providing new requested contract language. Requests for complete replacement of the City of Richmond's Standard Services Agreement for another contract will not be granted. Failure to make exceptions to the RFP or Standard Services Agreement within the proposal will be deemed a waiver of any objection. Exceptions will be considered during the proposal evaluation process.

#### **I. Statement of Impartiality and Disclosure**

The nature of this Project requires an impartial unbiased approach on the part of the proposer's team. This proposal shall include a statement declaring that the proposer's and sub-consultants are not currently, and will not, during the performance of these services, participate in any other similar work involving a third-party with interests currently in conflict or likely to be in conflict with City of Richmond's interests. Additionally, proposer is required to disclose any pending or active investigations or litigation that may affect the reputation or ability of the proposer to carry out the Project.

### **4.0 PROCESS FOR SUBMITTING PROPOSALS**

#### **Questions Concerning Request for Proposals**

All questions must be submitted via the electronic BidsOnline system on the Q&A tab by 11:00 am PST, on June 10, 2020. If the City finds it necessary to issue an

addendum, prospective Offerors will receive e-mail notification of addendum. Otherwise, answers to questions received will be provided on the Q&A tab and notification will be sent by June 12, 2020.

Any party submitting a proposal shall not contact or lobby any City Council member, City official, employee (except those specified for contact) or agent regarding the RFP. Any party attempting to influence or circumvent the RFP, bid submittal, and review process may have their proposal rejected for violating this provision of the RFP.

Interested parties may download copies of the above mentioned proposal by visiting the City's web site, [www.ci.richmond.ca.us/bids](http://www.ci.richmond.ca.us/bids). To download RFP, new vendors will be required to register. Once the prospective Offeror downloads any documents relative to a solicitation, that Offeror's name will appear on the Prospective Bidders list for that project.

### **Method of Submission:**

Electronic Proposals shall be submitted via the City's secure online bidding system. All required sections of the proposal must be submitted via the website. Contractor is solely responsible for "on time" submission of their electronic proposal. The Bid Management System will not accept late proposals and no exceptions shall be made. Contractors will receive an e-bid confirmation number with a time stamp from the Bid Management System indicating that their bid was submitted successfully. The City will only receive those proposals that were transmitted successfully.

The proposal must be received no later than 4:00 p.m., local time, on June 19, 2020.

The proposal and any required certifications shall be signed by an individual or individuals authorized to execute legal documents on behalf of the proposer.

The City of Richmond reserves the right to waive inconsequential irregularities.

## **5.0 PROPOSAL EVALUATION AND SELECTION PROCESS**

All proposals shall be reviewed to verify that the Respondent has met the minimum requirements. Proposals that have not complied with requirements, do not meet minimum content and quality standards, or take unacceptable exceptions to the General Terms and Conditions of the Service Agreement, will be eliminated from further consideration. Proposals will be reviewed and evaluated by an evaluation committee comprised of City of Richmond personnel.

The top Proposals may then be invited to make a presentation to the evaluation panel in a City Office in Richmond, California, at no cost to the City. The selected proposal shall

provide the most cost effective approach that meets the City's requirements. The lowest price proposal will not necessarily be selected.

The City reserves the right to reject any or all proposals, or to make no award. The City also reserves the right to require modifications follow-up with requests for additional information, including, but not limited to, follow-up interviews. The City may request Best and Final offers based upon improved understanding of the offers or changed scope of service. The City will negotiate with that vendor to determine final pricing, and contract form. Because this proposal is negotiable, all pricing data will remain confidential until after award is made, and there will be no public opening and reading of Proposals. Overall responsiveness to the RFP is an important factor in the evaluation process. The criteria upon which the evaluation of the proposals will be based include, but are not limited to, the following:

### **The Proposal/Methodology and Approach to Work – 20%**

The proposer's responsiveness to the RFP including completeness and thoroughness of proposal; all required information must be provided in the format specified. This category will also evaluate:

- Ability to provide services as outlined in the RFP.
- Approach and proposed methodology to project scope
- Demonstrated knowledge of the work required
- Explanation of the Project or services required
- Innovative approaches and internal measures for timely completion of Project

### **Experience/Past Performance/References – 20%**

Consideration will be given based upon the firm's experience, years in business, past and current client references; technical expertise and professional competence in areas directly related to this RFP; number of years of experience in performing similar work.

### **Project Team – 20%**

Respondent should demonstrate that all key personnel have been successfully involved with projects of similar scope and magnitude. This category will evaluate the firm's:

- Qualifications and relevant individual experience
- Unique qualification of key personnel
- Staff Availability / Time commitment of key members
- Organization chart

### **Proposer Qualifications – 20%**

This category will evaluate the respondent's ability to take upon itself the responsibilities set forth in the Scope of Services and produce the required outcome in a timely manner. Consideration will be given for the overall quality of the proposal, including a demonstrated understanding of the purpose, scope and objective of the services to be

performed. It is the intention of the City of Richmond to award a contract to the Respondent who furnishes satisfactory evidence that the Respondent has the requisite experience and ability to enable the Respondent to execute the work successfully and properly, and to complete services in a timely manner. To determine the degree of responsibility to be credited to the Respondent, the City of Richmond will weigh the evidence that the Respondent has performed satisfactorily other contracts of like nature, magnitude and comparable difficulty and comparable rates of progress.

### **Cost Proposal – 20%**

**Interview/presentations** - The selection committee will review the proposals and establish a list of finalists based on evaluation criteria. Approximately 1 hour will be allowed for the oral interview and a question and answer session. The Respondent must lead a brief presentation before the Review Panel. Interviews shall be conducted during the week of June 29, 2020. Each Respondent is asked to keep these dates open. No other interview dates shall be provided. Respondent presentations will be scheduled at the discretion of the City and Respondents shall bear any expense associated with such presentation. Respondents not available to attend the presentation may be removed from further consideration. Respondents are expected to place the date for the interviews on their calendar at this time; alternate scheduling will not be accommodated.

**Award** - When the Review Panel has completed its work, City staff will then recommend an Actuarial Services firm to the City Manager and City Council for approval. The services provided by the successful bidder shall be governed by a Standard Services Agreement (Attachment 1).

## **6.0 GENERAL GUIDELINES**

This RFP does not commit the City of Richmond to award a contract, to defray any costs incurred in the preparation of a proposal pursuant to this RFP, or to procure or contract for work. The City of Richmond may reject a proposal without providing the reason(s) underlying the declination. A failure to award a contract to the proposer with the lowest cost proposal shall not constitute a valid cause of action against the City of Richmond. The City may investigate the qualifications of any respondent under consideration, require confirmation of information furnished by the respondent, and require additional evidence or qualifications to perform the Services described in this RFP.

### **The City reserves the right to:**

1. Reject any or all proposals.
2. Issue subsequent Requests for Proposal.
3. Postpone opening for its own convenience.
4. Remedy technical errors in the Request for Proposal process.
5. Negotiate with any, all, or none of the Respondents.

6. Solicit best and final offers from all or some of the Respondents.
7. Select one or more Respondents.
8. Accept other than the lowest proposed fees.
9. Waive informalities and irregularities in proposals.

## **Public Records**

All proposals submitted in response to this RFP become the property of the City of Richmond and public records and, as such, may be subject to public review. Documents protected by law from public disclosure will not be disclosed by the City of Richmond if clearly marked with the word "confidential" on each applicable page. Trade secrets may be marked as confidential only to the extent they meet the requirements of California Government Code section 6254.7. Only information claimed to be a trade secret at the time of submittal to the City of Richmond and marked as "confidential" will be treated as a trade secret.

## **7.0 CONDITIONS AND REQUIREMENTS –**

### **7.0 Insurance Requirements**

The City of Richmond requires consultants doing business with it to obtain insurance, as shown in RFP Attachment 2. The required insurance certificates must comply with all requirements of the standards as shown and must be provided within fifteen (15) days of issuance of the Notice of Intent to Award and prior to the commencement of any work on the Project.

### **7.1 Business Licenses**

The successful Contractor will be required to hold or to obtain a City of Richmond business license for which the fee will not be waived.

## **8.0 SCOPE OF SERVICES**

### **8.1 Provide City with professional services and dedicated personnel to perform the following:**

- Analyze the data to assess any inconsistencies and make recommendations for enhancing data quality
- Prepare actuarial valuation reports every year for General Pension, Garfield Pension, Police and Fire Pension Plan that follow GASB 67/68 standards, City OPEB plan and RPOA OPEB plan that follow GASB 75 standards to include the following:

Actuarial present value of total projected benefits.  
Actuarial accrued liability

- Actuarial value of assets
- Unfunded actuarial accrued liability
- Normal cost
- Annual required contributions of the employer as a level dollar amount and as a level percentage of covered payrolls
- Net OPEB obligation for City disclosure under GASB 67/68 and GASB 75

- Prepare the necessary material for the Comprehensive Annual Financial Report (CAFR) to comply with GASB OPEB reporting and disclosure requirements.
- Prepare an analysis to determine how establishing a trust or equivalent arrangement would affect the interest rate assumption. Timing considerations of establishing the trust should also be considered.
- Prepare a cash flow analysis (the "pay-as-you-go-cost").
- Prepare a sensitivity analysis showing the impact of alternative assumptions on the employer's contributions (healthcare trend rates and investment rate assumptions).
- If there is not a trust established, determine the difference in liability based upon the investment returns under a diversified portfolio versus a short-term fixed income portfolio.
- Provide strategies for funding and reducing costs.
- Discuss administrative draft of the report with city personnel at city location.
- Present final report at regularly scheduled City Council meeting.
- City valuation report date will be the beginning of the fiscal year in July.
- Assist City Staff with miscellaneous analyses as needed for various projects.

## **8.2 Project Approach:**

- Conduct initial discussions with the City to develop an in-depth understanding of its post-retirement health care plan in order to learn about data availability, management information system capabilities and to discuss specific issues the City would like to address during the review.
- Submit written data requests to the City (e-mail is acceptable)
- Gather and compile data provided by the City and review for reasonableness. Anomalies (if any) would be identified and clarified as appropriate.

## **ATTACHMENTS**

1. Standard Contract
2. Insurance Requirements

## Valerie Lewis

---

**From:** Sabrina Lundy  
**Sent:** Wednesday, June 16, 2021 9:04 AM  
**To:** Sabrina Lundy  
**Cc:** Jasuara Castaneda; Pamela Christian; Ursula Deloa  
**Subject:** Approved Consent Calendar Items - June 15, 2021, City Council Meeting

**The following Consent Calendar items were approved by the City Council at its June 15, 2021, meeting:**

### **HOUSING AUTHORITY CONSENT CALENDAR**

F-1. ADOPT a resolution authorizing a contract amendment with Express Professionals for as-needed staffing services to support unit turnover activities in an amount of \$150,000, for a new total not to exceed amount of \$450,000 and extending the term to June 30, 2023.

F-2. ADOPT a resolution approving a contract amendment with Intergraded Security Management Group (ISMG) for security services at Nevin Plaza and Hacienda in the amount of \$774,939, for a total not to exceed amount of \$2,178,511, ending August 1, 2023.

F-3. APPROVE the minutes of the May 25, 2021, Special Richmond Housing Authority meeting.

### **CITY COUNCIL CONSENT CALENDAR**

G-1. APPROVE a first contract amendment with Keyser Marston Associates (KMA) in the amount of \$25,000, not to exceed a total amount of \$35,000, through December 31, 2023, to assist the City in preparing guidelines for implementation of the recently adopted inclusionary housing program and affordable housing linkage fee program.

G-2. APPROVE a one-year Lease Agreement, with a one-year extension option with Point San Pablo Harbor, Inc., a California corporation.

G-3. ADOPT a resolution approving positions of City of Richmond Finance Director, City of Richmond Internal Services Deputy City Manager, and City of Richmond Accounting Manager, as authorizing signatory on the Mechanics Bank Public Entity Banking Resolution.

G-4. APPROVE a contract with Van Iwaarden Associates for actuarial services necessary for pension fund management with the termination date of June 30, 2022. The amount of the contract is \$26,000.

G-5. ADOPT a resolution adding Zoom to the approved list of standing orders/outline agreements for technology related goods and services in an amount not to exceed \$150,000 per year for Fiscal Years 2021-2022 through 2024-2025.

G-6. APPROVE the minutes of the May 18 and 25, 2021, regular meetings of the City Council.

G-7. APPROVE a contract with Municipal Code Corporation, for ordinance, zoning code codification, and supplements of the City's municipal code, for a one-year period to extend, for the City Clerk's Office and the Planning Department, from July 1, 2021, through June 30, 2022, in the amount of \$19,000.

City of Richmond

Page 1

Actuarial Services RFP, bidding on June 19, 2020 4:00 PM (Pacific)

Printed 11/25/2020

**Bid Detail****Bid Information**

**Project Title** Actuarial Services RFP  
**Invitation No.**  
**Bid Posting Date** May 29, 2020 5:27 PM (Pacific)  
**Project Stage** Closed  
**Bid Due Date** June 19, 2020 4:00 PM (Pacific)  
**Response Format** Electronic only  
**Link to Project on Public Site** <https://www.planetbids.com/portal/portal.cfm?CompanyID=14590&BidID=73040>  
**Reference ID**

**Project Type** RFP (Request For Proposal)  
**Response Types** Response File  
**Type of Award** Lump Sum  
**Categories** 91806 - Administrative Consulting  
91837 - Economy Consulting  
91849 - Finance/Economics Consulting  
94600 - Financial Services

**License Requirements**

**Department** Finance  
**Address** 450 Civic Center Plaza, Richmond, California  
**County** Contra Costa

**Bid Valid****Liquidated Damages**

**Target Bid Amount** \$0.00

**Estimated Bid Value****Start/Delivery Date****Project Duration**

**Prevailing Wage** No

**Cooperative Bid** No

**Piggy-backable** No

**eBid Notes** Electronic Proposals shall be submitted via the City's secure online bidding system. All required sections of the proposal must be submitted via the website. Contractor is solely responsible for "on time" submission of their electronic proposal. The Bid Management System will not accept late proposals and no exceptions shall be made. Contractors will receive an e-bid confirmation number with a time stamp from the Bid Management System indicating that their bid was submitted successfully. The City will only receive those proposals that were transmitted successfully.

**Preferences**

**Restriction Type** None

**Restricted To****Bid Bond Information**

**Bid** 0.0%  
**Performance** 0.0%  
**Payment** 0.0%

**Pre-Bid Meeting Information**

**Pre-Bid Meeting** No

**Online Q&A**

**Online Q&A** Yes  
**Q&A Cutoff Date** June 10, 2020 11:00 AM (Pacific)

City of Richmond

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Actuarial Services RFP, bidding on June 19, 2020 4:00 PM (Pacific)

Printed 11/25/2020

**Bid Detail****Contact Information**

**Contact Info** Ofelia Alvarez - 510-620-6699  
ofelia\_alvarez@ci.richmond.ca.us

**Bids to**  
**Owner's Agent**

**Description**

**Scope of Services** The City of Richmond, hereinafter referred to as the "City", is soliciting proposals for Other Post-Employment Benefits (OPEB) and Closed Pension Plans Actuarial Services. Qualified firms, hereafter referred to as "vendor(s)", which meet the requirements set forth in this Request for Proposal are encouraged to participate.

**Other Details** For assistance in downloading RFP, please contact Ofelia Alvarez at Ofelia\_Alvarez@ci.richmond.ca.us

**Notes**

**Local Programs & Policies**

**Special Notices**

**Downloadable Files**

File Title	File Name	File Size	On Server	Uploaded Date	Visible
Insurance Type 2 - Professional Services	Sample Type 2 - Professional Services Contracts.pdf	240.4 kb	On Server	05/29/2020	Yes
Standard Contract	Sample - Standard Contract.pdf	688.1 kb	On Server	05/29/2020	Yes
Actuarial Services RFP	2020 Actuarial Services.docx	205.1 kb	On Server	05/29/2020	No
attachment 1	FYE2019 GASB 67-68 Pension Accounting_Richmond General.pdf	516.2 kb	On Server	06/10/2020	No
attachment 2	FYE2019 GASB 67-68 Pension Accounting_Richmond Garfield.pdf	441.6 kb	On Server	06/10/2020	No
Attachment 3	FYE2019 GASB 67-68 Pension Accounting_Richmond Police Fire.pdf	252.8 kb	On Server	06/10/2020	No
Attachment 4	FYE2019 GASB 75 OPEB Valuation_Richmond (RPOA Plan).pdf	432.8 kb	On Server	06/10/2020	No

**Download File Fee** \$0.00

**Hard Copy Plans**

Title/Description	Receive From	Plan Fee	Mailing Fee	Refund
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City of Richmond

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Actuarial Services RFP, bidding on June 19, 2020 4:00 PM (Pacific)

Printed 11/25/2020

**Vendor Notifications**

468 vendors notified

Notified Vendors on May 29, 2020

**Using Criteria Category:**

91806 - Administrative Consulting  
 91837 - Economy Consulting  
 91849 - Finance/Economics Consulting  
 94600 - Financial Services

**22nd Century Technologies, Inc.**  
 (755354)  
 220 Davidson Avenue, Suite 118  
 Somerset, NJ 08873  
 United States

**Contact:** Shikha Sharma  
**Phone:** 908-765-0002 ext. 359  
**Fax:** 732-537-0888  
**Email:** sledbids@tscti.com

**280 Securities LLC** (859996)  
 220 Montgomery Street  
 Suite 1060  
 San Francisco, CA 94104  
 United States

**Contact:** Michael Hurtado  
**Phone:** 628-231-2564 ext. 122  
**Fax:** 628-231-2170  
**Email:** mhurtado@280securities.com

**A Squared Ventures, Inc.** (221006)  
 1970 Broadway  
 Suite 1100  
 Oakland, CA 94612  
 United States

**Contact:** Andrea Lowe  
**Phone:** 510-986-1100 ext. 0  
**Fax:**  
**Email:** asquaredventures@gmail.com

**A-1-Kuh-Muter Services, LLC** (349163)  
 224 Cimarron Drive  
 Vallejo, CA 94589  
 United States

**Contact:** Ercia Artis  
**Phone:** 510-895-5364  
**Fax:**  
**Email:** a1kuhmuter@gmail.com

DBE, MBE, WBE

**A. M. Peche & Associates LLC** (326788)  
 1025 Morton Street  
 Alameda, CA 94501-3904  
 United States

**Contact:** Albert M. Peche  
**Phone:** 510-521-2077  
**Fax:** 510-521-2078  
**Email:** apeche@PecheAssociates.com

**Aanko Technologies Inc.** (369544)  
 607 Elmira Rd, Ste 191  
  
 Vacaville, CA 95687  
 United States

**Contact:** Steve Longoria  
**Phone:** 415-408-8004  
**Fax:** 415-520-5330  
**Email:** steve.longoria@aanko.com

**Above Consulting Inc.** (771597)  
 899 Capp St Apt 3  
 San Francisco, CA 94110  
 United States

**Contact:** Eddie Tang  
**Phone:** 415-723-6513  
**Fax:**  
**Email:** eddie.tang@aboveconsultinginc.com

**Academy Securities** (333045)  
 12625 High Bluff Drive  
 Suite # 204  
 San Diego, CA 92130  
 United States

**Contact:** Richard Vest  
**Phone:** 951-698-4700  
**Fax:**  
**Email:** rvest@academysecurities.com

MBE

**Access Capital Services, Inc.** (37596)  
 200 E. Center St  
 Visalia, CA 93291  
 United States

**Contact:** Wendy J. Rivera  
**Phone:** 559-627-5221  
**Fax:** 559-737-5877  
**Email:** wrivera@acscollectors.com

**Acclamation Insurance Management Services** (302823)  
 10445 Old Placerville Road  
 Sacramento, CA 95827  
 United States

**Contact:** Veronica Romero  
**Phone:** 916-563-1900 ext. 260  
**Fax:**  
**Email:** vromero@aims4claims.com

**Accountable Assets Inc** (331028)  
 280 Perry Road  
 Perryopolis, PA 15473  
 United States

**Contact:** Dave Bergman  
**Phone:** 412-819-0927  
**Fax:** 724-736-0907  
**Email:** aaibergman@verizon.net

**Vendor Notifications**

**Accurate Drug, Alcohol and DNA Testing** (37600)  
675 Hegenberger Rd.  
Suite 227  
Oakland, CA 94621  
United States

**Contact:** Regina Jones  
**Phone:** 510-777-0904  
**Fax:** 510-777-0905  
**Email:** rjones@accuratemgmt.com

OSB,DBE,MIC,WBE

**Acro Service Corporation** (305803)  
39209 W Six Mile Road Suite 250  
Livonia, MI 48152  
United States

**Contact:** John Gillen  
**Phone:** 626-799-3475 ext. 407  
**Fax:**  
**Email:** jgillen@acrocorp.com

**Actuarial Factor LLC** (366968)  
11050 SW 128 Avenue  
Miami, FL 33186  
United States

**Contact:** Esperanza Borja Mead  
**Phone:** 786-397-9212  
**Fax:**  
**Email:** esperanza.mead@actuarialfactor.com

MBE,WBE

**AIM Consulting Inc** (37677)  
221 Randall Drive  
Folsom, CA 95630  
United States

**Contact:** Gladys Cornell  
**Phone:** 916-357-5397  
**Fax:** --  
**Email:** gcornell@aimconsultingco.com

OSB,DBE,MIC,WBE

**AIM Consulting Services** (472673)  
12121 Valley Blvd. #206  
  
El Monte, CA 91732  
United States

**Contact:** ScottBurkett  
**Phone:** 9092283970  
**Fax:** 9095921271  
**Email:** sburkett@aimcsworld.com

**Alamo Capital** (274892)  
201 N. Civic Dr., Suite 360  
Walnut Creek, CA 94596  
United States

**Contact:** Nader Mokri  
**Phone:** 949-260-9023  
**Fax:**  
**Email:** nmokri@alamocapital.com

WBE

**Albion Environmental, Inc.** (37699)  
1414 Soquel Avenue  
Suite 205  
Santa Cruz, CA 95062  
United States

**Contact:**  
**Phone:** 831-469-1777  
**Fax:** 831-469-9137  
**Email:** cconvisser@albionenvironmental.com

**Allerion Consulting Group, Inc.**  
(449448)  
1830 Vernon St  
Roseville, CA 95678  
United States

**Contact:** Blake Salzman  
**Phone:** 916-742-5096  
**Fax:**  
**Email:** blake.salzman@aceqc.com

**Amec Foster Wheeler** (39704)  
180 Grand Avenue  
Suite 1100  
Oakland, CA 94612  
United States

**Contact:** Virginia Wong-Jew  
**Phone:** 510-663-4100  
**Fax:** 510-663-4141  
**Email:** virginia.wong-jew@amecfw.com

**AmeriNational Community Services, Inc.**  
(37790)  
8121 E. Florence Ave.  
Downey, CA 90240  
United States

**Contact:** Amber Amundson  
**Phone:** 507-369-1356  
**Fax:** --  
**Email:** aamundson@amerinational.net

**AMI Risk Consultants Inc.** (366499)  
1336 SW 146th Ct.  
Miami, FL 33184  
United States

**Contact:** Carrie Ingco  
**Phone:** 305-273-1589  
**Fax:**  
**Email:** cingco@comcast.net

**Amy Ekan Business Enterprises**  
(241248)  
p.o. 1975  
el cerrito, CA 94530  
United States

**Contact:** Keyma Randle  
**Phone:** 310-770-5832  
**Fax:**  
**Email:** ongb2012@gmail.com

**Vendor Notifications**

**Analytic Focus, LLC** (299959)  
11467 Huebner Road  
Suite 200  
San Antonio, TX 78230  
United States

**Contact:** Leroy Alloway  
**Phone:** 210-641-2817  
**Fax:**  
**Email:**  
l.alloway@analyticfocus.com

**Anhor Engineering, Inc.** (37819)  
3685 Mt. Diablo Blvd  
Suite 355  
Lafayette, CA 94549  
United States

**Contact:** HEIDE CHAPMAN DVB,OSB  
**Phone:** 925-385-0950  
**Fax:** 295-385-0424  
**Email:** hchapman@anchorm.com

**Applied Development Economics**  
(282351)  
253 Ygnacio Valley Road  
Walnut Creek, CA 94596  
United States

**Contact:** Tony Daysog  
**Phone:** 925-934-8712  
**Fax:**  
**Email:** tdaysog@adeusa.com

**Applied Development Economics, Inc.**  
(37836)  
100 Pringle Avenue  
Suite 560  
Walnut Creek, CA 94596  
United States

**Contact:** Doug Svensson OSB  
**Phone:** 925-934-8712  
**Fax:** 925-934-2402  
**Email:** dsvensson@adeusa.com

**ARS National** (779942)  
270 W 2nd Ave  
Escondido, CA 92025  
United States

**Contact:** Phillip Prince  
**Phone:** 760-690-9362  
**Fax:** 760-690-1728  
**Email:**  
phillip.prince@arsnational.com

**Aspen Environmental Group** (37892)  
5020 Chesebro Road, Suite 200  
Agoura Hills, CA 91301  
United States

**Contact:** Aspen EG  
**Phone:** 818-597-3407  
**Fax:** 818-597-8001  
**Email:** Business@aspeneg.com

**Atlantic-Pacific Processing Systems**  
(254862)  
18350 Mt. Langley, Suite 205  
Fountain Valley, CA 92708  
United States

**Contact:** Maurice Holloway  
**Phone:** 714-241-1402 ext. 2354  
**Fax:** 714-965-2714  
**Email:**  
mholloway@approcessing.com

**Attic Consulting** (37909)  
74 Garfield Ave  
Easthampton, MA 94702  
United States

**Contact:** Eve Eichwald WBE  
**Phone:** 413-386-7555  
**Fax:** 413-604-0371  
**Email:** eveeichwald@verizon.net

**AU & Associates Inc.** (37911)  
9320 Annapolis Rd.  
Suite 300  
Lanham, MD 20706  
United States

**Contact:** Ade Uiyoshioria OSB,DBE,WBE  
**Phone:** 202-345-0696  
**Fax:** 888-508-6410  
**Email:** adeu@auanda.com

**Automated Merchant Systems, Inc.**  
(398491)  
600 Northlake Blvd., Suite 230  
Altamonte Springs, FL 32701  
United States

**Contact:** Daniel L. Sloan  
**Phone:** 407-331-5465  
**Fax:**  
**Email:**  
dsloan@automatedmerchant.com

**B A R 1 Construction** (37932)  
712 Bancroft RD 260  
Walnut Creek, CA 94598  
United States

**Contact:** DBE  
**Phone:** 925-262-3201  
**Fax:** 510-225-2336  
**Email:**  
kevinbarron@bar1construction.com

**Backstrom McCarley Berry & Co, LLC**  
(37940)  
115 sansome st  
mezzanine a  
san francisco, CA 94104  
United States

**Contact:** Leonard berry DBE  
**Phone:** 415-392-5505  
**Fax:** 415-392-5276  
**Email:** vmccarley@bmcaco.com

**Vendor Notifications**

<b>Backstrom McCarley Berry &amp; Co., LLC</b> (37941) 115 Sansome St. Mezz. A San Francisco, CA 94104 United States	<b>Contact:</b> <b>Phone:</b> 415-392-5505 <b>Fax:</b> -- <b>Email:</b> lberry@bmcbbco.com	DBE
<b>BAE Urban Economics, Inc</b> (37942) 1285 66th St Emeryville, CA 94608 United States	<b>Contact:</b> LISA LONDON <b>Phone:</b> 510-547-9380 <b>Fax:</b> 510-547-9388 <b>Email:</b> lisalondon@bae1.com	WBE
<b>Baker Tilly Virchow Krause, LLP</b> (297761) Ten Terrace Court Madison, WI 53718-2004 United States	<b>Contact:</b> Cynthia Gruebling <b>Phone:</b> 608-240-2451 ext. 42451 <b>Fax:</b> 608-249-8552 <b>Email:</b> cynthia.gruebling@bakertilly.com	
<b>Ballard Spahr LLP</b> (328484) 1735 Market Street 51st Floor Philadelphia, PA 19103 United States	<b>Contact:</b> Laura Michaels <b>Phone:</b> 215-864-8435 <b>Fax:</b> <b>Email:</b> publicfinanceRFP@ballardspahr.com	
<b>Bank of America</b> (194454) 2129 Shattuck Ave Berkeley, CA 94704 United States	<b>Contact:</b> James Diangson <b>Phone:</b> 510-725-5780 <b>Fax:</b> <b>Email:</b> james.diangson@bankofamerica.com	
<b>Bank of San Francisco</b> (267111) 575 Market Street, Suite 900 San Francisco, CA 94105 United States	<b>Contact:</b> Raymond Brown <b>Phone:</b> 415-744-6705 <b>Fax:</b> <b>Email:</b> ray.brown@bankofsf.com	
<b>Bank of the West</b> (277922) 500 Capitol Mall Ste 1200 Sacramento, CA 95814 United States	<b>Contact:</b> Lily Ng <b>Phone:</b> 916-552-4404 <b>Fax:</b> <b>Email:</b> Government@bankofthewest.com	
<b>Baron Center, Inc</b> (178977) 2588 El Camino Real, F-304 Carlsbad, CA 92008 United States	<b>Contact:</b> Jaimee Pittman <b>Phone:</b> 760-476-9110 <b>Fax:</b> 760-476-9229 <b>Email:</b> JPittman@baroncenter.com	
<b>Bartlett Actuarial Group, Ltd.</b> (37954) 4700 East Thomas Road, Suite 106 Phoenix, AZ 85018 United States	<b>Contact:</b> Julie Ekdorn <b>Phone:</b> 602-956-3293 <b>Fax:</b> 602-441-3504 <b>Email:</b> juliee@bartlettactuarialgroup.com	
<b>BBJ Electric Inc</b> (37989) 320 Avalon Dr South San Francisco, CA 94080 United States	<b>Contact:</b> <b>Phone:</b> 650-583-4294 <b>Fax:</b> 650-876-0121 <b>Email:</b> bbj@bbjelectric.com	
<b>BDO PHA Finance</b> (313103) 770 Kenmoor SE Suite 300 Grand Rapids, MI 49546 United States	<b>Contact:</b> Nick Auriemma <b>Phone:</b> 215-940-7808 <b>Fax:</b> <b>Email:</b> nauriemma@bdo.com	
<b>Bear, Stearns &amp; Co. Inc.</b> (37993) 1999 Avenue of the Stars 31st Floor Los Angeles, CA 90067 United States	<b>Contact:</b> JUAN PITTMAN <b>Phone:</b> 310-201-7883 <b>Fax:</b> 310-201-2754 <b>Email:</b> jnpittman@bear.com	
<b>Berkowitz Civility Group</b> (434616) 2342 Shattuck Ave #219 Berkeley, CA 94704 United States	<b>Contact:</b> Steffi Berkowitz <b>Phone:</b> 954-504-1552 <b>Fax:</b> <b>Email:</b> steffi.civility@gmail.com	WBE

City of Richmond

Actuarial Services RFP, bidding on June 19, 2020 4:00 PM (Pacific)

Printed 11/25/2020

**Vendor Notifications**

**Bette AB Mammone** (38016)  
2017 Genesee Street  
Utica, NY 13501  
United States

**Contact:** Bette AB Mammone  
**Phone:** 315-732-3900  
**Fax:** 315-732-4389  
**Email:** bette@fundingstrategies.org

**Beyond Consulting** (38019)  
Post Office Box 441201  
Aurora, CO 80044  
United States

**Contact:** Angela Campbell, DBE,WBE  
President  
**Phone:** 303-337-1343  
**Fax:** 303-371-4313  
**Email:**  
acampbell@beyondconsulting.com

**Bickmore and Associates, Inc.** (38022)  
1750 Creekside Oaks Drive, Suite 200  
Sacramento, CA 95833  
United States

**Contact:** Deborah Cosentino  
**Phone:** 916-244-1100 ext. 4645  
**Fax:** 916-244-1199  
**Email:** marketing@brsrisk.com

**Big-D Pacific Builders** (42907)  
6210 Stoneridge Mall Rd  
Suite 460  
Pleasanton, CA 94588  
United States

**Contact:**  
**Phone:** 925-460-3232  
**Fax:** 925-460-3242  
**Email:**  
bahman.bina@bdpbbuilders.com

**Birdi And Associates, Inc.** (215342)  
265 N Euclid Ave  
Suite 203  
Pasadena, CA 91101  
United States

**Contact:** TinaSingh  
**Phone:** 2134003652  
**Fax:**  
**Email:** tsingh@birdi-inc.com

**BL Management Consulting LLC**  
(38039)  
1731 E Samuel Drive  
Phoenix, AZ 85024-4363  
United States

**Contact:** WBE  
**Phone:** 480-251-7420  
**Fax:** --  
**Email:**  
eharwood.blmanageconsulting@blue  
tie.com

**Blaylock Robert Van, LLC** (38043)  
350 Frank Ogawa Plaza  
10th Floor  
Oakland, CA 94612-2045  
United States

**Contact:** Michael G. James WBE  
**Phone:** 510-208-6101  
**Fax:** 510-625-1065  
**Email:** mjames@brv-llc.com

**Blaylock Roebt Van, LLC** (131471)  
350 Frank H Ogawa Plaza  
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**Contact:** Tarrell Gamble MBE  
**Phone:** 510-208-6101  
**Fax:**  
**Email:** tgamble@brv-llc.com

**BLD Consulting** (397739)  
5700 Drexel Court  
Rancho Cucamonga, CA 91701  
United States

**Contact:** Brian Drolet  
**Phone:** 909-989-1435  
**Fax:**  
**Email:**  
bldrolet@FireRMSData.com

**Blessing Egbon Investments** (38044)  
7005 Heard Rd  
Cumming, GA 30041  
United States

**Contact:** Blessing Egbon  
**Phone:** 404-395-0993  
**Fax:** 641-354-2823  
**Email:**  
begbon@blessingegboninvestments  
.com

**blueCONSULTING, INC.** (38050)  
4415 New Hampshire St  
San Diego, CA 92116  
United States

**Contact:** OSB,WBE  
**Phone:** 619-839-3828  
**Fax:** --  
**Email:** aandersonblue@cs.com

**BLX Group LLC** (326375)  
777 S. Figueroa Street, Suite 3200  
Los Angeles, CA 90017  
United States

**Contact:** Glenn Casterline  
**Phone:** 213-612-2229  
**Fax:** 213-612-2499  
**Email:** gcasterline@blxgroup.com

**Bright Futures Growth and  
Development Center** (256332)  
1060 Manor Road  
Richmond, CA 94803  
United States

**Contact:** Ivy Winston  
**Phone:** 510-758-4898  
**Fax:**  
**Email:** brightfutures100@aol.com

**Vendor Notifications**

**Brink's, Incorporated** (38094)  
3775 Alameda Ave., Ste. "A"  
Oakland, CA 94601-3921  
United States

**Contact:** Ashleigh Feilinger  
**Phone:** 510-535-4523  
**Fax:** 510-535-4510  
**Email:**  
Ashleigh.Feilinger@brinks.com

**Brogan Home Inspection, Inc.** (38099)  
920 York Street  
Oakland, CA 94610-1640  
United States

**Contact:** Christine Brogan WBE  
**Phone:** 510-835-3887  
**Fax:** 510-281-6911  
**Email:** cbrogan123@sbcglobal.net

**Brown Smith Wallace LLC** (38105)  
1050 N. Lindbergh  
St. Louis, MO 63132  
United States

**Contact:** Ron Steinkamp  
**Phone:** 314-983-1238  
**Fax:** --  
**Email:** rsteinkamp@bswllc.com

**Browne, Bortz and Coddington, Inc**  
(702762)  
1999 Broadway, Suite 2200  
Denver, CO 80202  
United States

**Contact:** Rebecca Garvoille  
**Phone:** 303-321-2547  
**Fax:**  
**Email:**  
procurement@bbcresearch.com

**Build It Green** (38119)  
1434 University Ave  
Berkeley, CA 94702  
United States

**Contact:** Elise Hunter  
**Phone:** 510-845-0472  
**Fax:** 510-845-1854  
**Email:** elise@builditgreen.org

**Bureau Veritas** (38127)  
11590 West Bernardo Court  
Suite 100  
San Diego, CA 92127  
United States

**Contact:** David Meloy  
**Phone:** 972-244-6938  
**Fax:** 858-451-2846  
**Email:**  
david.meloy@bureauveritas.com

**Burnham Benefits** (567104)  
660 S Figueroa St. Suite 2250  
Los Angeles, CA 90017  
United States

**Contact:** Diane Ballen  
**Phone:** 213-788-7557  
**Fax:**  
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ballen@burnhambenefits.com

**Business Advantage Consulting** (38135)  
2377 Gold Meadow Way  
Gold River, CA 95670  
United States

**Contact:** Nicole Taylor OSB,MIC,WBE  
**Phone:** 916-932-7181  
**Fax:** 916-932-7182  
**Email:** services@business-  
advantage.net

**C&S Publishing** (238955)  
8041 Tallon Way  
Antelope, CA 95843  
United States

**Contact:** Steve Berlin  
**Phone:** 916-729-5432  
**Fax:**  
**Email:**  
CandSpublishing@gmail.com

**C.M. de Crinis & Co., Inc.** (326944)  
100 N. Brand Blvd., Suite 605  
Glendale, CA 91203  
United States

**Contact:** Curt de Crinis  
**Phone:** 818-385-4900  
**Fax:**  
**Email:** curt@cmdecrinis.com

**Cafiero Maritime Services** (38154)  
1001 Tyler St  
Hollywood, FL 33019  
United States

**Contact:** Gerry Cafiero  
**Phone:** 954-802-5871  
**Fax:** 954-921-6157  
**Email:** gerry@cafieromaritime.com

**California Creative Solutions, Inc.**  
(651673)  
13475 Danielson Street, Suite 220  
Poway, CA 92064  
United States

**Contact:** Hitesh Jain MBE  
**Phone:** 858-208-4131  
**Fax:**  
**Email:**  
mbeprogram@ccsglobaltech.com

**california professional maintenance  
com** (38186)  
2601 Hilltop Avenue, STE. 1911  
richmond, CA 94806  
United States

**Contact:** ALEX PEGUES DBE,OSB  
**Phone:** 510-677-7767  
**Fax:** 213-488-1266  
**Email:** alexp.cpmc@gmail.com

**Vendor Notifications**

**Cameron-Cole (38203)**  
50 Hegenberger Loop  
Oakland, CA 94621  
United States

**Contact:** Timothy Hobbs  
**Phone:** 510-777-1860  
**Fax:** —  
**Email:** thobbs@cameron-cole.com

**Cantor Fitzgerald (38208)**  
1925 Century Park East  
Suite 700  
Los Angeles, CA 90067  
United States

**Contact:** Richard Vest  
**Phone:** 310-282-6667  
**Fax:** 310-286-0603  
**Email:** rvest@cantor.com

**Capital One Public Funding, LLC (38210)**  
265 Broadhollow Rd  
Melville, NY 11747  
United States

**Contact:** Jaci Bretz  
**Phone:** 866-617-2337  
**Fax:** 866-617-2330  
**Email:**  
jaci.bretz@capitalonebank.com

**Capital Partnerships Inc. (231920)**  
560 Dewey Boulevard  
San Francisco, CA 94116-1427  
United States

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Actuarial Services RFP, bidding on June 19, 2020 4:00 PM (Pacific)

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**TransFirst LLC** (231668)  
12202 Airport Way, Suite 100  
Broomfield, CO, CA 80021  
United States

**Contact:** Aldwin Marquis  
**Phone:** 714-827-7000 ext. 330  
**Fax:** 714-827-7711  
**Email:** amarquis@transfirst.com

**Trilogy Capital Management, LLC.**  
(41069)  
13475 Danielson Street, Suite 220  
Poway, CA 92064-8858  
United States

**Contact:** MITCH BONILLA  
**Phone:** 858-208-4540  
**Fax:** 858-227-5088  
**Email:**  
MBonilla@TrilogyCapitalManageme  
nt.com

**Tuseda Graggs** (41091)  
5810 Panama Ave  
Richmond, CA 94804  
United States

**Contact:** 1094 Chesapeake Drive, WBE  
Pittsburg 94565  
**Phone:** 510-332-9455  
**Fax:** --  
**Email:** tuseda@yahoo.com

**Tveter Insurance Services** (292476)  
P.O. Box 273  
Danville, CA 94526  
United States

**Contact:** Clifford Tveter  
**Phone:** 925-408-5756  
**Fax:** 925-946-0762  
**Email:** tveterinsurance@gmail.com

**Type For You Online** (41095)  
6457 Birchview Way  
Sooke, BC V9Z-1J9  
Canada

**Contact:** Candice Csaky WBE  
**Phone:** 250-208-7909  
**Fax:** --  
**Email:** info@typeforyouonline.com

**U.S. Bank** (316693)  
1 California St., Suite 350  
San Francisco, CA 94111  
United States

**Contact:** Donna Chu  
**Phone:** 415-565-9017  
**Fax:**  
**Email:** donna.chu@usbank.com

**UFI** (641192)  
17821 E. 17th Street  
Tustin, CA 92882  
United States

**Contact:** Katelyn Brewer  
**Phone:** 714-923-3575  
**Fax:**  
**Email:**  
katelynb@urbanfuturesinc.com

**UltraSystems Environmental (DBE | WBE | SBE)** (255723)  
16431 Scientific Way  
Irvine, CA 92618  
United States

**Contact:** Betsy A. Lindsay OSB,DBE,CADIR,M  
**Phone:** 949-788-4900 ext. 227 IC,WBE  
**Fax:** 949-788-4901  
**Email:** blindsay@ultrasystems.com

**Union Bank of California** (41106)  
350 California Street, 11th Floor  
San Francisco, CA 94104  
United States

**Contact:** Andy Jeremi  
**Phone:** 415-705-5043  
**Fax:** 415-705-5052  
**Email:** andy.jeremi@uboc.com

**UnionBanc Investment Services**  
(141867)  
445 South Figueroa Street, 11th Floor  
Los Angeles, CA 92705  
United States

**Contact:** Mark Morrissey  
**Phone:** 213-236-7070  
**Fax:**  
**Email:**  
mark.morrissey@unionbank.com

**Vendor Notifications**

<b>Unlimited Educational Solutions</b> (41118) 4800 Hershey Court Richmond, CA 94804 United States	<b>Contact:</b> Nafeesh Ilahi <b>Phone:</b> 510-821-4426 <b>Fax:</b> -- <b>Email:</b> UESBoundlessLearning@gmail.com	WBE
<b>US Tech Solutions, Inc</b> (200808) 10 Exchange Pl, Suite # 1820 Jersey City, NJ 07302 United States	<b>Contact:</b> SK ASIF UDDIN <b>Phone:</b> 201-613-5179 <b>Fax:</b> 201-524-9601 <b>Email:</b> rfp@ustechsolutions.com	MBE
<b>Utility Services</b> (453648) 4444 montgomery San Francisco, CA 94014 United States	<b>Contact:</b> Jay Howard <b>Phone:</b> 415-415-4445 <b>Fax:</b> <b>Email:</b> comcast@comcast.net	
<b>Van Brunt Associates, Inc.</b> (41160) 1401 N. Broadway, Suite 225 Walnut Creek, CA 94596 United States	<b>Contact:</b> Michael Van Brunt <b>Phone:</b> 925-685-5900 <b>Fax:</b> -- <b>Email:</b> mike@vanbruntassociates.com	WBE
<b>Vining Sparks IBG, L.P.</b> (41191) 775 Ridge Lake Blvd Memphis, TN 38120 United States	<b>Contact:</b> JAIME LOFTIN <b>Phone:</b> 800-786-1295 <b>Fax:</b> 901-762-5517 <b>Email:</b> jloftin@viningsparks.com	
<b>vTech Solution Inc.</b> (755917) 1100 H Street, N.W. Suite 450 Washington, DC 20005 United States	<b>Contact:</b> Haresh <b>Phone:</b> 202-644-9774 ext. 202 <b>Fax:</b> <b>Email:</b> rfp.vtech@vtechsolution.com	
<b>Wahlstrom &amp; Associates</b> (41229) 2140 shattuck avenue berkeley, CA 94702 United States	<b>Contact:</b> Stephen Wahlstrom <b>Phone:</b> 510-684-6253 <b>Fax:</b> 510-898-1778 <b>Email:</b> swahlstrom@localeconomicgroup.com	
<b>Webb Municipal Finance, LLC</b> (710561) 3750 McCray St Riverside, CA 92506 United States	<b>Contact:</b> Pam Gamble <b>Phone:</b> 951-686-1070 <b>Fax:</b> <b>Email:</b> info@webbmfinance.com	
<b>Wedbush Morgan Securities</b> (41262) 610 Newport Center Drive Suite 1300 Newport Beach, CA 92660 United States	<b>Contact:</b> Don Collins <b>Phone:</b> 866-579-2871 <b>Fax:</b> -- <b>Email:</b> don.collins@wedbush.com	
<b>Wells Fargo Advisors</b> (407419) ONE NORTH JEFFERSON AVENUE MAC H0005-6D St. Louis, MO 63103 United States	<b>Contact:</b> Jacob Drescher <b>Phone:</b> 847-572-4384 <b>Fax:</b> <b>Email:</b> jacob.drescher@wellsfargoadvisors.com	
<b>Wells Fargo Institutional Securities, LL</b> (41265) 400 Capitol Mall, Suite 702 Sacramento, CA 98814 United States	<b>Contact:</b> <b>Phone:</b> 916-440-4135 <b>Fax:</b> -- <b>Email:</b> lewisjum@wellsfargo.com	
<b>Wells Fargo Securities</b> (243173) 550 California Street, Floor 10 MAC A0112-108 San Francisco, CA 94103 United States	<b>Contact:</b> Readie Callahan <b>Phone:</b> 415-396-2988 <b>Fax:</b> <b>Email:</b> readie.callahan@wellsfargo.com	
<b>Western Economic Services, LLC</b> (335103) 212 SE 18th Avenue Portland, OR 97214 United States	<b>Contact:</b> Robert Gaudin <b>Phone:</b> 503-239-9091 <b>Fax:</b> <b>Email:</b> rgaudin@westernes.com	

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**Vendor Notifications**

**Whitney White** (546615)  
1514 Alice St  
Apt 46  
Oakland, CA 94612  
United States

**Contact:** Whitney White  
**Phone:** 603-417-0463  
**Fax:**  
**Email:** d.whitneywhite@gmail.com

MBE,WBE

**Wilfong and Associates, Inc.** (40940)  
333 Estudillo Avenue  
Suite 207  
San Leandro, CA 94577  
United States

**Contact:** Maria E. Canteros  
**Phone:** 888-283-5810  
**Fax:** 510-352-9900  
**Email:**  
mcanteros@ibigeewatsi.com

OSB,MIC,WBE

**Willdan Financial Services** (41313)  
27368 Via Industria  
Suite 110  
Temecula, CA 92590  
United States

**Contact:** CHRIS FISHER  
**Phone:** 951-587-3500  
**Fax:** 951-587-3510  
**Email:** rsmith@willdan.com

**Willdan Financial Services** (41314)  
27368 Via Industria  
Suite 110  
Temecula, CA 92590  
United States

**Contact:** MARK J. RISCO, VICE  
PRESIDENT  
**Phone:** 951-587-3587  
**Fax:** 951-587-3510  
**Email:** aromanelli@willdan.com

**Williams Wallace Management  
Consulting Services** (198770)  
P.O. Box 8631  
Emeryville, CA 94662  
United States

**Contact:** Samuel Manning  
**Phone:** 510-470-8901  
**Fax:**  
**Email:** Smann1@hotmail.com

**Wits Solutions Inc.** (757226)  
44790 Maynard Square  
Suite 340  
Ashburn, VA 20147  
United States

**Contact:** Raju Kalidindi  
**Phone:** 800-952-9487 ext. 11  
**Fax:**  
**Email:**  
statebids@witssolutions.com

**WOLF & ASSOCIATES, INC.** (41336)  
1353 Old Temescal Road  
Suite 204  
Corona, CA 92881  
United States

**Contact:** Eva Wolf  
**Phone:** 951-254-2771  
**Fax:** --  
**Email:**  
EVA@WOLFANDASSOC.COM

DBE,WBE

**World Financial Group** (41344)  
4120 Presidential Parkway  
Suite 200  
Atlanta, GA 30339  
United States

**Contact:** Lisa Sehanne  
**Phone:** 770-256-7068  
**Fax:** --  
**Email:** lisa@wealthwatchers.biz

**WQ** (41351)  
2356 Trade Zone Blvd  
San Jose, CA 95131  
United States

**Contact:**  
**Phone:** 415-596-1633  
**Fax:** --  
**Email:**  
wqprospector@workquote.com

DBE

**Youth Finance Insitute of America**  
(549209)  
926 Pomona Ave.  
Albany, CA 94706  
United States

**Contact:** Amiko Foster  
**Phone:** 510-816-1576  
**Fax:**  
**Email:** amiko.foster@yfia.org

**Zilo International Group** (613683)  
3939 E. Arapahoe Rd  
Ste 210  
Centennial, CO 80122  
United States

**Contact:** Milena Zilo  
**Phone:** 917-225-1851  
**Fax:**  
**Email:**  
milena@zilointernational.com

WBE

Notified Vendors on June 10, 2020

**Using Criteria Category:**

91806 - Administrative Consulting  
91837 - Economy Consulting  
91849 - Finance/Economics Consulting  
94600 - Financial Services

Notified Vendors on June 10, 2020

**Using Criteria Category:**

PlanetBids, Inc.

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## Vendor Notifications

### Using Criteria Category:

91806 - Administrative Consulting  
91837 - Economy Consulting  
91849 - Finance/Economics Consulting  
94600 - Financial Services

Notified Vendors on June 10, 2020

### Using Criteria Category:

91806 - Administrative Consulting  
91837 - Economy Consulting  
91849 - Finance/Economics Consulting  
94600 - Financial Services

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**Prospective Bidders**

19 Prospective Bidders

<b>Vendor</b>	<b>Contact</b>	<b>Vendor Type</b>	<b>Pre-Bid</b>	<b>Status</b>
<b>Jefferson Solutions, Inc.</b> 14 Brittany Oaks Clifton Park, NY 12065 United States	<b>Contact:</b> Raymond Cerrone <b>Phone:</b> 518-461-7805 <b>Fax:</b> <b>Email:</b> ray.cerrone@jefsi.com			Bidder
<b>DMullisInsurance</b> 1299 Boltonfield St. Columbus, OH 43228 United States	<b>Contact:</b> David Mullis <b>Phone:</b> 505-988-6583 <b>Fax:</b> <b>Email:</b> dmullisinsurance@gmail.com			Bidder
<b>Mercer Canada Ltd.</b> 800-120 Bremner Boulevard Suite 800 Toronto M5J 0A8 Canada	<b>Contact:</b> Elise Rettinger <b>Phone:</b> 514-841-7530 <b>Fax:</b> <b>Email:</b> rfpcanada@mercercanada.com			Bidder
<b>Northern Consulting Actuaries, Inc.</b> 100 Pine Street Suite 1250 San Francisco, CA, CA 94111-5234 United States	<b>Contact:</b> Jim van Iwaarden <b>Phone:</b> 415-678-1983 <b>Fax:</b> <b>Email:</b> jimvi@vaniwaarden.com			Bidder
<b>Lauterbach &amp; Amen, LLP</b> 668 N River Road Naperville, IL 60563 United States	<b>Contact:</b> Todd <b>Phone:</b> 630-393-1483 <b>Fax:</b> 630-393-2516 <b>Email:</b> tschroeder@lauterbachamen.com			Bidder
<b>Bartel Associates , LLC</b> 411 Borel Ave, Suite 101 San Mateo, CA 94402 United States	<b>Contact:</b> Katherine Moore <b>Phone:</b> 650-377-1603 <b>Fax:</b> <b>Email:</b> moliver@bartel-associates.com			Bidder
<b>George &amp; Bell Consulting</b> M2-601 West Broadway Vancouver, BC V5Z 4C2 Canada	<b>Contact:</b> Sarah Hutchinson <b>Phone:</b> 604-871-4151 <b>Fax:</b> <b>Email:</b> shutchinson@georgeandbell.com			Bidder
<b>Lotus USA Inc.</b> 27125 Sierra Hwy., STE 326-A . Santa Clarita, CA 91351 United States	<b>Contact:</b> Madhuri Yalamanchi <b>Phone:</b> 213-298-7100 <b>Fax:</b> <b>Email:</b> sivaprasad@lotususa.com	OSB,MBE,MI C,WBE		Bidder
<b>Deltek</b> 2291 Wood Oak Dr Herndon, VA 20171 United States	<b>Contact:</b> Source Management <b>Phone:</b> 206-373-9500 <b>Fax:</b> 789-656-5110 <b>Email:</b> sourcemanagement@deltek.com			Bidder
<b>Prime Vendor Inc.</b> 4622 Cedar Ave. Bldg 5, Suite #123 Wilmington, NC 28403 United States	<b>Contact:</b> Bid Clerk <b>Phone:</b> 800-746-9554 <b>Fax:</b> 800-746-8307 <b>Email:</b> govtbids@prime-vendor.com			Bidder
<b>GovInvest Inc.</b> 3625 Del Amo Blvd #200 Torrance, CA 90503 United States	<b>Contact:</b> Jason Huk <b>Phone:</b> 310-371-7106 <b>Fax:</b> <b>Email:</b> Jason@govinvest.com			Bidder
<b>Gila LLC</b> 8325 Tuscany Way Austin, TX 78754 United States	<b>Contact:</b> Elye Sackmary <b>Phone:</b> 512-323-4223 <b>Fax:</b> 866-283-6484 <b>Email:</b> MSBbids@navient.com			Bidder
<b>Reliable Supply, Inc.</b> PO Box 40444 Grand Junction, CO 81504 United States	<b>Contact:</b> Lovely Banquil <b>Phone:</b> 970-243-1929 <b>Fax:</b> <b>Email:</b> lovely@reliable-supply.com			Non-Bidder, no communicati ons
<b>HUB International Canada West ULC</b> 411 Dunsmuir Street, Suite 400 Vancouver, BC V6B 1X4 Canada	<b>Contact:</b> Amy Lockhart <b>Phone:</b> 902-429-8013 <b>Fax:</b> <b>Email:</b> amy.lockhart@hubinternational.com			Bidder

City of Richmond

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**Prospective Bidders****sevenoutsource**

113 Barksdale Professional Center  
Newark, DE 19711-3258  
United States

**Contact:** steve walse**Phone:** 315-308-7852**Fax:****Email:** rfpalerts@gmail.com

Bidder

**Segal Consulting**

1800 M Street NW, #900 S  
Washington, DC 20036  
United States

**Contact:** Herbert Afful**Phone:** 202-833-6458**Fax:****Email:** hafful@segalco.com

Bidder

**Taylor-Walker Consulting, LLC**

10619 S Jordan Gateway  
Suite 335  
South Jordan, UT 84095  
United States

**Contact:** Nancy Stanley**Phone:** 801-562-5748**Fax:****Email:** nstanley@taylor-walker.com

Bidder

**Risk and Regulatory Consulting, LLC.**

20 Batterson Park Road  
Suite 280  
Farmington, CT 06032  
United States

**Contact:** Jennifer Kelly**Phone:** 855-246-0815**Fax:** 860-409-4882**Email:** marketingRRC@riskreg.com

Bidder

**The Nyhart Company**

8415 Allison Pointe Boulevard, Suite 300  
Indianapolis, IN 46250  
United States

**Contact:** Leanne Willett**Phone:** 317-845-3513**Fax:** 317-845-3655**Email:** leanne.willett@nyhart.com

Bidder

City of Richmond

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Actuarial Services RFP, bidding on June 19, 2020 4:00 PM (Pacific)

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**Q & A**

<b>Vendor</b>	<b>Submit Date</b>	<b>Question</b>	<b>Answer</b>	<b>Release Date</b>	<b>Set</b>
Jefferson Solutions, Inc.	06/08/2020 7:07 AM (Pacific)	1) What are the fiscal years included in this RFP for actuarial services for the three Pension Plans and the OPEB Plans?	FY20/21	06/10/2020 9:33 AM (Pacific)	1.1
Jefferson Solutions, Inc.	06/08/2020 7:07 AM (Pacific)	2) The title of the proposal specifically states the Request for Proposal (RFP) is for Other Post Employments Benefits Actuarial Services but the document further mentions that the City currently has three closed Pension Plans – General Pension, Garfield Pension and Police & Fire Pension Plan governed by GASB statement 67/68 in which we need actuarial reports every year and the Statement of Work specifies preparation of actuarial valuation reports every year for General Pension, Garfield Pension, Police and Fire Pension Plan that follow GASB 67/68 standards. Is the City requiring GASB 67/68 compliant valuations and reports for the three closed pension plans?	Yes, the city is requiring GASB67/68 compliant valuations and reports for the three closed pension plans.	06/10/2020 9:33 AM (Pacific)	1.2
Jefferson Solutions, Inc.	06/08/2020 7:07 AM (Pacific)	3) If yes, is it the City's intent to award a single contract to a single firm for both the closed Pension Plans and the OPEB actuarial valuations and reporting or would the City consider award of separate contracts to separate firms (one contract for the GASB 67/68 valuation of the closed Pension Plans and a separate contract to a separate firm for the OPEB actuarial valuations and reporting)?	The city's intent is to award a single contract to a single firm for both the closed pension plans and the OPEB actuarial valuations and reporting.	06/10/2020 9:33 AM (Pacific)	1.3
Jefferson Solutions, Inc.	06/08/2020 7:09 AM (Pacific)	4) For what fiscal year were the last actuarial valuations and reports for the three closed Pension Plans and the OPEB Plans completed for the City?	FY18/19	06/10/2020 9:33 AM (Pacific)	1.4
Jefferson Solutions, Inc.	06/08/2020 7:09 AM (Pacific)	5) Can we receive copies of the last valuation reports for the three closed Pension Plans?	Files attached.	06/10/2020 9:33 AM (Pacific)	1.5
Jefferson Solutions, Inc.	06/08/2020 7:10 AM (Pacific)	6) What is the name of the firm that completed the last full Pension Plan valuations and reports?	Van Iwaarden Associates	06/10/2020 9:33 AM (Pacific)	1.6
Jefferson Solutions, Inc.	06/08/2020 7:10 AM (Pacific)	7) What were the fees charged by that firm for those valuations and reports?	City OPEB Plan - \$4,923, RPOA OPEB Plan - \$4,852, Garfield - \$2,500, General Pension - \$2,500, Police and Fire Pension - \$2,500	06/10/2020 9:33 AM (Pacific)	1.7
Jefferson Solutions, Inc.	06/08/2020 7:16 AM (Pacific)	8) The RFP states that the City manages two separate Plans for OPEB. What employee groups are participants/covered under each plan?	The Richmond Police Officers Association OPEB Plan is for RPOA employees that were active as of January 17, 2017. The City OPEB Plan is for all other employees.	06/10/2020 9:33 AM (Pacific)	1.8
Jefferson Solutions, Inc.	06/08/2020 7:17 AM (Pacific)	9) Is the City requesting two separate OPEB actuarial valuations and reports (one for each employee group plan)?	The City is requesting two separate OPEB actuarial valuations and reports.	06/10/2020 9:33 AM (Pacific)	1.9

**Q & A**

<b>Vendor</b>	<b>Submit Date</b>	<b>Question</b>	<b>Answer</b>	<b>Release Date</b>	<b>Set</b>
Jefferson Solutions, Inc.	06/08/2020 7:17 AM (Pacific)	10) The RFP states that "As of January 17, 2017 the Richmond Police Officers Association OPEB plan was adopted" and that "The City established the Secured Pension Override Special Revenue Fund to which proceeds of a special incremental property tax levy voted by the citizens of the City of Richmond are credited for the payment of benefits under the Pension Plans." Is this Secured Pension Override Special Revenue Fund established and managed as a trust?	No	06/10/2020 9:33 AM (Pacific)	1.10
Jefferson Solutions, Inc.	06/08/2020 7:19 AM (Pacific)	11) If so, is the City requesting an OPEB actuarial valuation statement compliant with GASB Statement No. 74 for the Secured Pension Override Special Revenue Fund?	No	06/10/2020 9:33 AM (Pacific)	1.11
Jefferson Solutions, Inc.	06/08/2020 7:19 AM (Pacific)	12) When were the last full actuarial and report completed for the City's Other Post-Employment Benefits plans?	FY17/18	06/10/2020 9:33 AM (Pacific)	1.12
Jefferson Solutions, Inc.	06/08/2020 7:20 AM (Pacific)	13) What is the name of the firm that provided the most recent full actuarial valuation and reporting for the City's Other Post-Employment benefits plans?	Van Iwaarden Associates	06/10/2020 9:33 AM (Pacific)	1.13
Jefferson Solutions, Inc.	06/08/2020 7:20 AM (Pacific)	14) Can we receive copies of the last full actuarial valuations and reports?	Files attached.	06/10/2020 9:33 AM (Pacific)	1.14
Jefferson Solutions, Inc.	06/08/2020 7:21 AM (Pacific)	15) What were the fees charged to the City for the last full OPEB actuarial valuations and reports	The last full OPEB Valuation included both plans for \$19,037	06/10/2020 9:33 AM (Pacific)	1.15
Jefferson Solutions, Inc.	06/08/2020 7:22 AM (Pacific)	16) Have any subsequent interim or roll-forward reports been completed?	Yes, for FY18/19.	06/10/2020 9:33 AM (Pacific)	1.16
Jefferson Solutions, Inc.	06/08/2020 7:23 AM (Pacific)	13) What is the name of the firm that provided the subsequent interim actuarial valuation and reporting for the City's Other Post-Employment benefits plans?	Van Iwaarden Associates	06/10/2020 9:33 AM (Pacific)	1.17
Jefferson Solutions, Inc.	06/08/2020 7:24 AM (Pacific)	15) What were the fees charged to the City for the last full OPEB actuarial valuations and reports?	The last full OPEB Valuation included both plans for \$19,037	06/10/2020 9:33 AM (Pacific)	1.18
Jefferson Solutions, Inc.	06/08/2020 7:26 AM (Pacific)	16) Have any subsequent interim or roll-forward reports been completed?	Yes, for FY18/19.	06/10/2020 9:33 AM (Pacific)	1.19
Jefferson Solutions, Inc.	06/08/2020 7:27 AM (Pacific)	17) If so, can we receive a copy of that report?	Files attached.	06/10/2020 9:33 AM (Pacific)	1.20
Jefferson Solutions, Inc.	06/08/2020 7:27 AM (Pacific)	18) If an interim (roll-forward) report was completed, what were the fees charged for that report?	City OPEB Plan - \$4,923, RPOA OPEB Plan - \$4,852	06/10/2020 9:33 AM (Pacific)	1.21
Jefferson Solutions, Inc.	06/08/2020 7:28 AM (Pacific)	19) What are the requirements and frequency of onsite consulting, meetings, and/or presentations?	On as-needed basis	06/10/2020 9:33 AM (Pacific)	1.22
Jefferson Solutions, Inc.	06/08/2020 7:28 AM (Pacific)	20) Can any meetings be performed using voice conference and/or web meeting services?	yes	06/10/2020 9:33 AM (Pacific)	1.23

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## Q & A

Vendor	Submit Date	Question	Answer	Release Date	Set
Jefferson Solutions, Inc.	06/08/2020 7:28 AM (Pacific)	21) Please provide information on past external audits of the incumbent (if any) required by the District including the name of the external audit firm, procedures / experience, timing, audit scope, etc.	<a href="http://www.ci.richmond.ca.us">www.ci.richmond.ca.us</a> / Finance Department /Financial reports/CAFR reports	06/10/2020 9:33 AM (Pacific)	1.24

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**Addenda**

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**Bid Results**

4 Bid Results

**Bidder Details**

<b>Vendor Name</b>	The Nyhart Company
<b>Address</b>	8415 Allison Pointe Boulevard, Suite 300 Indianapolis, IN 46250 United States
<b>Respondee</b>	Suraj Datta
<b>Respondee Title</b>	National Healthcare Director
<b>Phone</b>	800-428-7106 Ext.
<b>Email</b>	suraj.datta@nyhart.com
<b>Vendor Type</b>	

**Bid Detail**

<b>Bid Format</b>	Electronic
<b>Submitted</b>	June 17, 2020 11:42:45 AM (Pacific)
<b>Delivery Method</b>	PlanetBid 2:40 p.m.
<b>Bid Responsive</b>	
<b>Bid Status</b>	Submitted
<b>Confirmation #</b>	216183
<b>Ranking</b>	0
<b>Amount</b>	\$0.00

**Respondee Comment****Buyer Comment****Attachments**

File Title	File Name	File Type
City of Richmond - FINAL	City of Richmond - FINAL.pdf	Response File

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**Bid Results****Bidder Details**

**Vendor Name** Jefferson Solutions, Inc.  
**Address** 14 Brittany Oaks  
Clifton Park, NY 12065  
United States  
**Respondee** Raymond R. Cerrone  
**Respondee Title** CPA, CEO  
**Phone** 518-461-7805 Ext.  
**Email** ray.cerrone@jefsi.com  
**Vendor Type**

**Bid Detail**

**Bid Format** Electronic  
**Submitted** June 19, 2020 10:47:00 AM (Pacific)  
**Delivery Method** Elcetronic/1:46 PM ET  
**Bid Responsive**  
**Bid Status** Submitted  
**Confirmation #** 216497  
**Ranking** 0  
**Amount** \$0.00

**Respondee Comment**

See attached Bid Proposal

**Buyer Comment****Attachments**

File Title	File Name	File Type
City of Richmond, CA Bid Proposal	City of Richmond, CA - FINAL.pdf	Response File

City of Richmond

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Printed 11/25/2020

**Bid Results****Bidder Details**

**Vendor Name** Northern Consulting Actuaries, Inc.  
**Address** 100 Pine Street  
Suite 1250  
San Francisco, CA, CA 94111-5234  
United States  
**Respondee** Mark Schulte  
**Respondee Title** Consulting Actuary  
**Phone** 612-596-5971 Ext.  
**Email** marks@vaniwaarden.com  
**Vendor Type**

**Bid Detail**

**Bid Format** Electronic  
**Submitted** June 19, 2020 2:26:22 PM (Pacific)  
**Delivery Method**  
**Bid Responsive**  
**Bid Status** Submitted  
**Confirmation #** 216214  
**Ranking** 0  
**Amount** \$0.00

**Respondee Comment****Buyer Comment****Attachments**

File Title	File Name	File Type
Richmond actuarial services - 2020 proposal_VIA	Richmond actuarial services - 2020 proposal_VIA.pdf	Response File

City of Richmond

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**Bid Results****Bidder Details**

**Vendor Name** Lauterbach & Amen, LLP  
**Address** 668 N River Road  
Naperville, IL 60563  
United States  
**Respondee** Todd Schroeder  
**Respondee Title** Director  
**Phone** 630-393-1483 Ext.  
**Email** tschroeder@lauterbachamen.com  
**Vendor Type**

**Bid Detail**

**Bid Format** Electronic  
**Submitted** June 19, 2020 9:03:23 AM (Pacific)  
**Delivery Method**  
**Bid Responsive**  
**Bid Status** Submitted  
**Confirmation #** 216480  
**Ranking** 0  
**Amount** \$0.00

**Respondee Comment****Buyer Comment****Attachments**

File Title	File Name	File Type
Lauterbach & Amen - OPEB Actuarial Services	LauterbachAndAmen_City of Richmond_Actuary_Proposal.pdf	Response File

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## **Project Evaluation**

### **Evaluators**

No Evaluators

### **Meetings**

No Meetings

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## **Project Evaluation**

### **Evaluator Forms**

No Evaluator Forms

### **Evaluator Attachments**

No Evaluator Attachments

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## **Project Evaluation**

### **Technical Qualifications**

No Technical Qualifications

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## **Project Evaluation**

### **Project Evaluation Notes**

No Evaluator Attachments

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## **Project Evaluation**

### **Project Evalutation Email**

No Project Evalutation Email

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## Email History

### Email - Q&A Notice

**Date Sent** 06/10/2020

**To** Gila LLC (MSBbids@navient.com), HUB International Canada West ULC (amy.lockhart@hubinternational.com), Mercer Canada Ltd. (rfpcanada@mercer.com), DMullisInsurance (dmullisinsurance@gmail.com), Prime Vendor Inc. (govtbids@prime-vendor.com), GovInvest Inc. (Jason@govinvest.com), George & Bell Consulting (shutchinson@georgeandbell.com), Lotus USA Inc. (sivaprasad@lotususa.com), Deltek (sourcemanagement@deltek.com), Jefferson Solutions, Inc. (ray.cerrone@jefsi.com), sevenoutsource (rfpalerts@gmail.com), Segal Consulting (hafful@segalco.com), Taylor-Walker Consulting, LLC (nstanley@taylor-walker.com), Risk and Regulatory Consulting, LLC. (marketingRRC@riskreg.com), The Nyhart Company (leanne.willett@nyhart.com)

**Subject** Q and A Set 1

**Message** Q & A Set 1

## Attachments

No Attachments

Actuarial Services RFP

RFP Rating Matrix 9/17/20	Rater 1	Rater 2	Rater 3	Rater 4	Rater 5	TOTAL
Nyhart	100	90	100	97	97	484
Lautebach & Amen, LLP (CPAs)	85	84	93	97	92	451
Van Iwaarden Associates	100	90	100	98	99	487
Jefferson Solutions	90	87	88	68	89	422
1. W. Reed 2. J. Gurule 3. D. Cuellar 4. W. Perez 5. M. Guillory						

proposal looks good/ located in San Diego

experience with municipalities (exclusively); located in illinois, no local referer

currently use them; team seems very satisfied; would prefer to continue with t  
they cut, copied, pasted our proposal (per wynonna); located in NY; closest lo

nces

hem / most experience in CA  
ocal reference is Fresno