

**Request for Proposal (RFP) for
Actuarial Services
Addendum #1 – January 29, 2024
Revisions to RFP and Responses to Questions**

Revisions:

Notice is hereby given that RFP for Actuarial Services of the East Bay Municipal Utility District has been revised as follows:

1. “Section C - IRAN Contracting Act Certification Contracting” has been replaced by “Section C - Consulting and Professional Services Agreement”.
2. Section D – IRAN Contracting Act Certification has been added.
3. “(8) OPEB/HIB Report” has been added to “Exhibit A – REQUIRED DOCUMENTATION AND SUBMITTALS – 4. Supplemental Questions – (i) Please provide samples of required reports”

Responses to Questions:

1. **Question:** Would the District accept a proposal that provides a clearly identified, negotiated contractual Limitation of Liability know by the District, with the negotiated limit, waived in the event of gross negligence or willful misconduct in lieu of the stated insurance requirements?
The District does not generally accept this type of agreement.
2. **Question:** Does EBMUD permit bidders to request a variance with regard to the insurance coverage levels?
The District does not generally accept variances.
3. **Question:** Will the District provide a grace period for the successful bidder to secure higher levels of insurance coverage?
Yes, but the verification of the correct levels of insurance coverage must be signed in order to start work.
4. **Question:** Can additional umbrella coverage suffice when a category of insurance (such as automotive and commercial general liability) falls below the required amount?
Yes.
5. **Question:** When are the actuarial valuation reports typically presented to the Board? At the January or March meeting?
Typically, valuation reports are delivered at the January Retirement Board meeting. The reports are to be delivered no later than March to give our District Board sufficient time to approve the employer contribution rates.

6. **Question:** Does the District also require a Risk Assessment Report?
Yes. At times in the past this has been included in the Valuation.
7. **Question:** Are the fees associated with the Supplemental Reports included in the pension and HIB valuation retainer fees?
Yes.
8. **Question:** Can proposers include more than one category for “junior consultant”?
Yes.
9. **Question:** Is it acceptable to simply provide a fixed fee for each of the required reports or is a breakdown of hours and billing rates required for each project?
It is acceptable and preferable to receive fixed fees for each required report.
10. **Question:** How will the Contract Equity Program portion of the Evaluation Criteria be scored?
Proposers shall be eligible for Small Business Enterprise (SBE) or Disabled Veteran Business Enterprise (DVBE) points if they are a certified small business entity, as described in Exhibit A – Contract Equity Program, and they check the appropriate box, requesting preference, in Exhibit A-Proposer Information and Acceptance. Qualified DVBEs and/or SBEs will receive points in this section.

ACKNOWLEDGEMENT OF RECEIPT OF THIS ADDENDUM SHALL BE INDICATED BY INSERTING THE ADDENDUM NUMBER AND ITS DATE ON THE FORM LABELED “PROPOSER INFORMATION AND ACCEPTANCE” IN EXHIBIT A.