

THOMAS P. DiNAPOLI
COMPTROLLER OF THE STATE OF NEW YORK



REQUEST FOR PROPOSALS

RFP0011

AMENDMENT #2

**ADMINISTRATIVE AND ACTUARIAL SERVICES FOR LENGTH OF SERVICE AWARD PROGRAMS FOR VOLUNTEER AMBULANCE
WORKERS AND VOLUNTEER FIREFIGHTERS**

ISSUED: MAY 13, 2025

AMENDED: JUNE 30, 2025

(PREVIOUSLY AMENDED: MAY 14, 2025)

This Request for Proposals (“RFP”) #0011 for Administrative and Actuarial Services for Length of Service Award Programs for Volunteer Ambulance Workers and Volunteer Firefighters issued by the Office of the State Comptroller (“OSC”) of the State of New York (“State”) on May 13, 2025, and first amended on May 14, 2025, is hereby amended as set forth below. Deletions appear in black strikethrough text and additions appear in **bold red** text. No other changes have been made at this time.

FIRST:

Section 1.0 (Calendar of Events) is amended as follows:

<u>EVENT</u>	<u>DATE</u>
Issuance of Request for Proposals	May 13, 2025
Deadline for Submission of Written Questions	June 4, 2025 4:00 p.m. ET
Responses to Written Questions Posted	June 18, 2025 June 30, 2025
Deadline for Submission of Proposals	July 3, 2025 July 15, 2025 4:00 p.m. ET
<u>Anticipated</u> Commencement of Work	May 14, 2026

SECOND:

Attachment C (Cost Proposal) is deleted in its entirety and replaced with the attached, amended Attachment C (Cost Proposal) form dated June 30, 2025, which has been amended to add a cost proposal line item at Section 6.3.B(i)(a) for an annual base fee for Plan Administration of Defined Contribution Plans.

Proposers **must** use the amended Attachment C (Cost Proposal) as posted on OSC's website for its official Cost Proposal submitted with its RFP Proposal.

The amended Attachment C is contained in the amended “Forms Only” document, which will be made available on OSC's website at: <https://www.osc.state.ny.us/procurement>.

ATTACHMENT C
COST PROPOSAL
(dated June 30, 2025)

AMENDED

The following includes the required format and information to be provided by the Proposer in the Cost Proposal. Fill in one amount on each line item of this attachment to reflect each fee (all inclusive). **Proposer may not add, remove, or edit fee descriptions. Proposers may identify "\$0" for any fee if it does not charge the identified fee.**

Failure to comply with format content requirements may result in disqualification.

RFP0011 ADMINISTRATIVE AND ACTUARIAL SERVICES FOR LENGTH OF SERVICE AWARD PROGRAMS FOR VOLUNTEER AMBULANCE WORKERS AND VOLUNTEER FIREFIGHTERS	
6.3.A. <u>Defined Benefit Plans:</u>	
1. Annual Fee for Plan Administration:	
a. Base Fee	\$ _____
b. Fee Per Pre-Entitlement Age Participant	\$ _____
c. Fee Per Post-Entitlement Age Participant	\$ _____
2. Per Participant Fee to Process NEW Distributions:	
a. Fee Per Distribution	\$ _____
3. Per Determination Fee to calculate the estimated annual costs for a proposed defined benefit service award program:	
a. Base Fee	\$ _____
b. Fee Per Participant	\$ _____
4. Per Determination Fee to calculate the estimated annual costs to transfer an existing plan from local administration to State administration, in the case of volunteer firefighter programs:	
a. Base Fee	\$ _____
b. Fee Per Participant	\$ _____
6.3.B. <u>Defined Contribution Plans:</u>	
i. Annual Fee for Plan Administration	
a. Base Fee	\$ _____
ii. Per Participant Fee for Plan Administration:	
a. Fee Per Participant	\$ _____
iii. Per Participant Fee to Process Distributions:	
a. Fee Per Distribution	\$ _____
iv. Per Participant Fee to calculate estimated annual cost of a proposed defined contribution service award program:	

a. Fee Per Participant	\$ _____
v. Per Determination Fee to calculate the estimated costs to transfer an existing plan from local administration to State administration, in the case of volunteer firefighter programs:	
a. Base fee	\$ _____
b. Fee Per Participant	\$ _____
6.3.C. <u>General Fees:</u>	
i. Fee for preparing relevant plan documents for NEW ambulance worker and firefighter programs, per plan:	\$ _____
ii. Fee for modifying plan documents for existing ambulance workers and firefighter programs, per plan, as necessary:	\$ _____
6.3.D. <u>Termination Fees:</u>	
i. Per Participant Fee for calculating the cost of terminating a defined benefit program, including the cost of making up any funding deficiency:	
a. Fee Per Participant	\$ _____
ii. Per Participant Fee for calculating the cost of terminating a defined contribution program:	
a. Fee Per Participant	\$ _____