



REQUEST FOR PROPOSAL (RFP)
FOR
CONSULTING SERVICES FOR
RETIREE HEALTH PLAN PROCUREMENT AND ADMINISTRATION
RFP NO. 4247
REVISED April 27, 2022

Release Date:	Tuesday, April 1, 2022	
Proposal Due Date:	Friday, May 6, 2022 3:00 P.M. PST Electronic (link here) or Mail LACERS 202 W. First St., Suite 500 Los Angeles, CA 90012-4401	RFP Administrator: Julie Guan Los Angeles City Employees' Retirement System E-mail: julie.guan@lacers.org Phone: (213) 855-7372 Fax: (213) 473-7297
All questions must be submitted in writing no later than:	Friday, April 15, 2022, 3:00 P.M. PST Submit questions to the RFP Administrator. Any questions and all answers will be posted on the LACERS website: https://www.lacers.org/rfps-contracting-opportunities	
Official RFP Notices/Addendums:	To ensure that no firm is provided an advantage over another, all requirements are specified in this RFP. Any changes to the requirements will be posted as an addendum to the RFP on the LACERS website: https://www.lacers.org/rfps-contracting-opportunities . Proposers are solely responsible for monitoring this website and adhering to RFP addendums.	
Prohibited Communications:	From the RFP release date until a contract for these services is fully executed, firms are prohibited from communicating with Board members or staff, other than the RFP Administrator, concerning this RFP or the resulting contract. Any communications could be considered attempts to lobby or market services and is therefore prohibited by LACERS' Ethical Contract Compliance Policy. Firms will be disqualified from contract consideration if the prohibition is not honored.	

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I. INTRODUCTION

The Los Angeles City Employees' Retirement System (LACERS) is seeking proposals from qualified firms with in-depth knowledge and expertise in public pension system health plan administration to act as the consultant to the LACERS Board and staff in the administration of its health and welfare program for LACERS' retired Members. In addition to providing consultation and advisory services, the consultant will oversee the annual contract renewal process of LACERS' health plans, assist in developing long-term strategic plans to optimize retiree health benefits while mitigating rising health care costs to LACERS, engage in program evaluation and development, guide the development of LACERS' wellness program, conduct related legislation and regulatory analysis, and assist in the development of Member communications. LACERS will generate an RFP for a Health Plan Consulting Services every three years and it is LACERS' intent to enter into a three-year contract with the selected firm.

The LACERS retiree health and welfare program has experienced increases in premium costs over the past several years, similar to other fully insured retiree organizations. LACERS will continue basing annual health care cost data on its own claims and utilization history, while using industry benchmarks for comparison. As part of LACERS' strategic planning, the consultant will work on LACERS' data initiative, which consists of evaluating data received from its health plan carriers at least once annually in order to identify significant health plan cost drivers, develop strategies to reduce their impact, and monitor the progress of these strategies. LACERS also seeks cost-effective strategies to improve the quality of life of its Members through its wellness program while controlling increases in its health insurance premium rates.

LACERS is a public pension plan providing retirement benefits, survivor benefits, disability retirement benefits, supplemental annuities, and health insurance benefits to Members and their beneficiaries. Established in 1937, pursuant to the City Charter, and under the management and control of a Board of Administration, LACERS is a defined benefit plan providing retirement and retiree health benefits to approximately 25,200 employees and 22,000 retirees and beneficiaries of the City of Los Angeles. The LACERS Board of Administration (Board) has seven members, each serving a five-year term. Working together under the direction of the Board and bound by our fiduciary obligation to our Members, LACERS strives to provide accurate, timely, reliable, and consistent retirement benefits and services. The consultant will work with staff to present to the Board or its committees health plan-related updates and reports, as requested.

The LACERS Board is the authorized trustee of the City of Los Angeles that oversees the retiree health and welfare program. LACERS' staff administers the program, which consists of selected health plan carriers, on behalf of its Retired Members and their dependents. Additionally, LACERS' staff administers health plan enrollments, conducts an annual Open Enrollment, prepares and distributes program materials and special communications, takes applications for changes in coverage according to rules developed by the Board, payroll-deducts Member premiums, assists Members with health plan claims and service issues, ensures Members are compliant with LACERS' Medicare enrollment requirements, posts eligibility information to the pension administration system, and assists retirees in accessing LACERS' program benefits. The

LACERS Board has developed plans and programs with the advice of actuaries, consultants, vendors, and staff. For 2022, the health and welfare program includes the following fully-insured medical and dental plans:

- Anthem Blue Cross HMO, PPO, and Medicare Advantage plans
- Kaiser Permanente HMO Traditional and Senior Advantage plans
- UnitedHealthcare Group Medicare Advantage HMO
- SCAN Medicare Advantage HMO
- DeltaCare USA HMO

The program also includes two LACERS self-funded plans:

- Delta Dental PPO
- Anthem Blue View Vision

The LACERS Health Benefits Guide provides an overview of LACERS health plan options and the coverage available, premium costs, and LACERS health benefits. The guide may be found in the Retired Members section of LACERS web site at www.lacers.org.

LACERS is initiating this RFP to obtain proposals from qualified and experienced firms (hereinafter referred to as “Proposer” and “Consultant”) that provide health plan consulting services to public pension systems. Proposers must have qualifications and experience in advising public employers or public retirement systems on health and welfare issues, including contract negotiations of annual premium rates and benefit plan designs with health plan carriers, to successfully perform the required services described herein. Proposers must have the minimum qualifications listed in Section III of this RFP to be considered for contract award.

It is LACERS’ intention to award one three-year contract to one Proposer for all services in Section III.B. or divide the services between two Consultants, one for General Consulting Services (Section III. 1-38) and one for Administering LACERS Self-Funding Programs (Section III. 39-40). If the Proposer submits alternatives and/or substitutions to the terms and conditions, LACERS reserves the right to determine if the alternatives/substitutions are acceptable.

II. MINIMUM QUALIFICATIONS

Firms must clearly demonstrate meeting the minimum qualifications for their Request for Proposal to be considered.

- At least five (5) years of experience providing health plan consulting services to assist public sector clients. A public sector client, for these purposes, must be a United States federal, state, municipal, or other local government client;
- The Proposer has conducted similar health and welfare consulting work as detailed in this RFP, resulting in positive impacts for at least three (3) other public sector retirement systems with over 22,000 members;
- Key personnel assigned to provide services to LACERS must have the equivalent of five (5) years of experience or more as a health and welfare consultant of public pension funds;

III. SCOPE OF SERVICES

GENERAL CONSULTING SERVICES

Consultation and Advisory Services

1. The Consultant will provide, as requested, advice to LACERS, conduct briefings, and perform consultative duties related to LACERS health plans.
2. The Consultant will provide day-to-day consultation on matters including, but not limited to, plan interpretation and problem resolution, and attend any meetings necessary to facilitate and assist in the management of LACERS health and welfare plans and programs.
3. The Consultant will attend meetings with LACERS and each of its plan carriers at least twice a year to discuss utilization, opportunities to reduce premium costs, and new programs.
4. The Consultant will attend the Benefits Administration Committee and the Board of Administration meetings where decisions regarding the program will be considered and as requested.
5. The Consultant will educate the LACERS Board and staff, as requested, on health benefits issues, legislation, strategic planning, new health plan products or models, and best practices, which will maintain the integrity of the Board's benefits objectives and philosophy.
6. The Consultant will prepare, as needed, comparison reports of other retirement systems' benefit plans and programs to determine competitiveness of rates, coverage levels, or benefits programs, as requested by the Board or LACERS staff.
7. The Consultant will provide, as needed, demographic and other data to equalize the risks represented by age, sex, and health status among competing health plans.
8. The Consultant will provide, as needed, actuarial and related services to assist LACERS in all phases of program planning, including analysis of past plan performance, cost/benefit of plan design changes, effect of specific legislative proposals, etc.
9. The Consultant will review existing LACERS health plan designs and premium rates and propose necessary modifications to meet LACERS objectives.
10. The Consultant will evaluate new companies, programs and/or benefits, and provide to LACERS an analysis of potential impact on service, costs, and administration for LACERS.
11. The Consultant will identify and provide administrative assistance to gain participation in cost-savings programs available through federal and/or state government or other agencies.

12. The Consultant will perform an annual end-of-year accounting of all participating/refunding contracts and provide appropriate recommendations relevant to the findings.

Health Plan Bid and Renewal Process

13. As directed by LACERS, the Consultant will develop, prepare, and release Requests for Renewal (RFR) or Requests for Proposal (RFP) to obtain cost and potential plan design changes from health carriers and consider new products and plan designs to improve cost efficiency.
14. The Consultant will handle related communications, and evaluate proposals submitted in response to an RFP or RFR.
15. The Consultant will negotiate plan design changes, rate calculations, and premium rates with health plan carriers.
16. The Consultant will report on preliminary renewal findings, basis of negotiations regarding rate development, and recommend options to reduce costs beyond negotiated results.
17. The Consultant will provide periodic Committee and Board reports, and other requested documents related to the annual health plan renewal, at least ten (10) working days prior to meeting date(s).
18. The Consultant will model program costs based upon claims data from health plan carriers.
19. The Consultant will assist with the development, negotiation, and implementation of performance standards and guarantees with LACERS health plan carriers and monitor their performance.
20. The Consultant will assist in the design, implementation, and administration of any new health plans.
21. The Consultant will review all related health plan contract documents and related Committee and Board reports to ensure that they accurately reflect the rates, benefits, and conditions, as approved by the LACERS Board, and will assist LACERS in the processing of its contracts in a timely manner.

Strategic Planning

22. The Consultant will assist staff in continuing LACERS' long-term strategic approach to optimize benefits, mitigate rising health care cost trends, and develop a mechanism to monitor and measure the progress of the plan on a semi-annual basis.

23. The Consultant will work with the health plan carriers to establish and meet performance goals to positively affect the utilization rates of health plan services, prescription drugs, disease management programs, and wellness programs.
24. The Consultant will attend meetings with LACERS and each of its plan carriers at least twice a year to discuss and assist in the implementation of LACERS' strategic goals.
25. The Consultant will survey the health plan industry for novel plan design options, with the goal of reducing future health program cost increases and report them to LACERS prior to the plan renewal or bid process.
26. The Consultant will assist LACERS in the administration of their strategic plan data initiative, which involves:
 - Reviewing health plan data and working with health plans to develop and provide drill-down reports to better understand utilization
 - Preparing semi-annual utilization data in summary report and/or dashboard format
 - Identifying cost drivers within each plan and collaborating with the health plans and LACERS to develop strategies to mitigate the impact of these cost drivers, which may involve value-based benefit plan design changes; consideration of new programs or plan offerings; or changes to the existing health benefits program; and communications efforts
 - Monitoring and reporting on the progress of strategies and their effect on cost drivers
27. The Consultant will assist LACERS staff in developing strategies to increase Member participation in disease management programs available through the retired Member, and possibly active Member, health plans.
28. The Consultant will evaluate LACERS current health and welfare program to ensure that it is aligned with its strategic plan goals and develop recommendations to improve it.
29. The Consultant will evaluate options available to LACERS in relation to health care legislation or requirements, and to develop strategies to further manage costs and reduce the impact of cost increases.
30. The Consultant will assist LACERS to identify and secure viable funding sources for the wellness program, including the cost of the wellness program manager, from its health plan carriers.
31. The Consultant will collaborate with LACERS staff in developing and implementing LACERS' wellness program.

Program Evaluation & Development

32. The Consultant will coordinate with LACERS health plans to deliver aggregate utilization reports, both for individual plans and for use in comparing plans.

33. The Consultant will verify, as needed, that LACERS medical plan carriers are compliant with regulations imposed by participation in Medicare Part D.
34. The Consultant will conduct, as needed, up to two health plan audits per year to evaluate the administration of benefits to ensure contract compliance, timeliness and accurate payment of claims, and other criteria as determined appropriate by LACERS.

Legislation and Regulatory Analysis

35. The Consultant will provide regular and timely communication of changes and proposed changes in federal and state statutes and regulations that may impact LACERS' health plans and its overall health and welfare program, and upon request, prepare reports on how such changes would impact LACERS or its Members.
36. The Consultant will recommend procedures and/or policies that LACERS should implement to comply with federal and state statutes and regulations, and conduct staff training, as necessary, on current issues.

SPECIAL PROJECTS – AS NEEDED

LACERS requires the following services on an as-needed basis. Upon development of the scope of work for the special project, LACERS will request a project proposal quote with a not-to-exceed fee. The fee must indicate the estimated hours for the project and consultant type that will be used. The consultant hourly rates shall be no greater than those submitted on the General Health Plan Consulting Fee Proposal sheet requested in response to this proposal.

37. The Consultant will assist in publication reviews, provide the services of a graphics designer, and as-needed communications and marketing assistance related to health administration. Publications include, but are not limited to, Open Enrollment packet envelopes, Health Benefits Guides, and Open Enrollment Health Bulletins. Communications and marketing assistance may include designing and/or reviewing health-related materials, and printing and mailing.
38. The Consultant will be responsible for, but is not limited to, working with LACERS staff on special projects consistent with meeting its strategic goals, such as auditing member/dependent health benefits eligibility, developing seminars, explaining new insurance industry products and legislative programs (e.g., Early Retiree Reinsurance Program), conducting surveys, and using innovative educational tools that could result in overall program savings.
 - a. LACERS currently is coordinating and facilitating the California Municipality Retiree Wellness Collaborative Meeting with other retired and active employee associations. The Consultant will be responsible for providing support with facilitating such meetings.

ADMINISTERING LACERS SELF-FUNDED PROGRAMS

These services may be separated from the General Health Plan Consulting Services Contract.

39. LACERS currently self-funds the Delta Dental PPO, as well as Anthem Blue View Vision Plan. The Consultant will provide services as stated under General Consulting Services, including but not limited to:

- a. Underwriting services,
- b. Actuarial services,
- c. Plan analysis,
- d. Cost/benefit plan design recommendations,
- e. Legislative analysis and impact to the self-funded program, and
- f. Performance, claims review and auditing, utilization review, etc.

40. LACERS may desire to self-fund additional medical programs in the future. The Consultant shall provide the aforementioned services to future self-funded programs.

IV. CONTENT OF RESPONSE

Response to the information requested below is required to be considered responsive to the RFP. Proposers are encouraged to submit a practical and sustainable proposal. The proposal is requested in the following order, to be tabbed accordingly:

A. PROPOSAL OF SERVICES

1. Title Page

The title page must clearly state "Proposal for Health Plan Consulting Services" along with vendor's name, address, and contact information.

2. Table of Contents

3. Cover Letter

- a. The cover letter shall have the following statement:
- b. "This proposal is genuine, and not sham or collusive, nor made in the interest or on behalf of any person not named therein; the proposer has not directly or indirectly induced or solicited any other proposer to put in a sham bid, or any other person, firm or corporation to refrain from submitting a proposal, and the proposer has not in any manner sought by collusion to secure for themselves an advantage over any other proposer."
- c. The legal business name, address, telephone number, website URL, and business status (Individual, limited liability partnership, corporation, etc.) of the firm.
- d. The person or persons authorized to represent the proposer in negotiations with LACERS with respect to the RFP and any subsequently awarded contract. Provide the

representative's name, title, address, telephone number, e-mail address and any limitation of authority for the person named.

- e. If the firm is proposing any alternatives/conditions to requirements detailed within the RFP, an explanation of the alternatives offered/conditions placed shall be detailed within this cover. LACERS reserves to right to reject proposals where the alternative/conditions are not acceptable.
- f. The cover letter is to be signed by a person or persons authorized to bind the proposer to all provisions of the RFP, any subsequent changes to the RFP, and to the contract if an award is made (If the respondent is a partnership, the response must be signed by a general partner in the name of the partnership. If the respondent is a corporation, the response must be signed on behalf of the corporation by two authorized officers [a Chairman of the Board, President or Vice-President, and a Secretary, Treasurer or Chief Financial Officer] or an officer authorized by the Board of Directors to execute such documents on behalf of the corporation).

4. Executive Summary

The Executive Summary must provide a statement specifying the submission of the proposal for either General Consulting Services (see Section III 1-38) or Administration of LACERS Self-Funded Programs (see Section III 39-40), or both; a concise summarization of the services and deliverables being offered to meet the requirements of this solicitation; the Proposer's approach to providing services; and justification as to why the Proposer is the best qualified to provide services.

5. Proposal of Services

Proposers shall demonstrate their understanding of the services to be provided and their proposed approach by responding to the following questions:

- a. How are you going to ensure we retain the lowest health plan premium rate increases?
- b. How have you utilized health plan data to reduce program costs in the past?
- c. By reviewing the LACERS *Well* website (www.lacERS.org/lacERSwell/), how would you take our wellness program to the next level?
- d. What makes your company/team stand out?
- e. How does your company/team align with LACERS five Guiding Principles – Professionalism, Innovation, Respect, Kindness & Caring, and Teamwork?
- f. Can you confirm that your company/team can perform all items listed in the scope of services section? If not, which items and why?
- g. If awarded the contract, the Consultant may be required to provide verification that your company/team will comply with the City of Los Angeles' COVID-19 safety protocols as set forth in Section 44 of the Standard Provisions for City Contracts (Appendix B)).

B. QUALIFICATIONS AND EXPERIENCE

1. Experience and Qualifications of Proposing Firm

Provide brief history, year founded, business entity type, location of headquarters and subsidiaries (if any), services provided, and approximate number of personnel (full-time, part-time, and seasonal).

2. Experience and Qualification of Key Personnel

Only key personnel who have the equivalent of five (5) years of experience or more as a health and welfare consultant of public pension funds may provide work on the LACERS Account

Qualifications and experience of the Proposer's key personnel and key personnel that will be assigned to this project. Submit resumes including: title, duties/tasks, listing of professional or relevant licenses and certifications held (if applicable), qualifications, as well as years of relevant work experience. LACERS reserves the right to approve or reject key personnel.

3. References & Experience with Similar Contracts

Proposer shall provide at least three (3) references from former or current clients over the past five years where services similar to those requested in this RFP as a health plan consulting services were provided. It is preferable that two of the three references are public agency clients. For each reference, please provide the following information:

- i. Client's Name
- ii. Business address
- iii. Phone number and email of person to contact for reference
- iv. The time period during which the services were provided
- v. Contract amount for services
- vi. The name of the Proposer's lead consultant on the project
- vii. A brief summary of the services provided

Note: Submission of a proposal in response to this RFP constitutes permission to LACERS to contact any identified previous clients to request information on the performance of the Proposer.

C. FEE PROPOSAL

Proposer shall complete the fee schedule worksheet(s) provided in this RFP or submit a schedule in substantially the same format with the same fee elements as the provided the schedule(s).

- If proposing for General Consulting Services, complete the fee schedule named "General Health Plan Consulting Fee Proposal"
- If proposing to provide services for Administration of LACERS Self-Funded Programs, complete the fee schedule named "Administration of LACERS Self-Funded Programs"
- Please note the opportunity to bid fee discounts if the contract for both General Health Plan Consulting Services and Administration of LACERS Self-Funded Programs are awarded to one proposer.

D. QUESTIONNAIRE

Answer each question contained in **Appendix D, RFP Questionnaire**. Each question of the RFP shall be repeated in its entirety before the answers. Proposer must respond to each question contained in the questionnaire. If a question does not apply to Proposer, please write in "not

applicable” and state the reasons why the question does not apply.

V. PROPOSAL SUBMISSION & EVALUATION

A. PROPOSAL SUBMISSION INSTRUCTIONS

1. Deadline for submission and upload link for submission are located on the cover sheet of this RFP. **Only electronic submissions are requested at this time.**
2. Electronic Submission Instructions
 - a. Please provide one copy of your entire proposal in PDF format, inclusive of any work samples, exhibits, and other required forms, with file naming format: “[Firm Name] - 2022 Health RFP” through this upload portal [here](#).
 - b. Email the RFP Administrator julie.guan@lacers.org that the proposal was submitted and request an acknowledgement of receipt
3. If your proposal contains any trade secrets or other proprietary, confidential information that the proposer claims is exempt from disclosure under the California Public Records Act, then you **must submit separately one (1) redacted copy of the proposal** in addition to the original version.
4. Proposers selected to make presentations to the Board/Committee may be required to submit 10 hard copies of their responses.
5. Candidates should allow adequate electronic file delivery time to ensure timely receipt of the proposals. Late proposals will not be considered for review. LACERS reserves the right to determine the timeliness of all proposals submitted.
6. At the day and time appointed, all timely submitted proposals will be opened and the name of the Proposers announced. No other information about the proposals will be made public until such time as a recommendation concerning proposals is made to the Board.
7. Please direct comments and questions to the RFP Administrator indicated on the cover page of this RFP. All contact regarding this RFP or any matter relating thereto must be in writing and may be e-mailed, mailed, or faxed to the administrator listed on the cover page.
8. If no more than one submission is received in response to this solicitation, LACERS reserves the right to classify this procurement a failed competition and either re-compete the procurement or enter into a sole source agreement with the sole respondent.
9. LACERS reserves the right to select more than one party to provide these services.

B. EVALUATION OF PROPOSALS

The selected proposer must successfully pass all the following levels of review:

Level I – Administrative Responsiveness

LACERS will conduct a preliminary evaluation of all proposals submitted by the deadline to determine compliance with proposal requirements and mandatory document submissions. Firm’s proposal must demonstrate its responsiveness to the administrative requirements outlined in the RFP. Firm’s ability to adhere to LACERS’ standard contract provisions will also be considered

(see General Conditions (Appendix A) and the Standard Provisions for City Contracts (Appendix B)).

Level II – Review of Qualifications, Experience, & References

Proposer must demonstrate it meets the minimum qualifications and must demonstrate a positive record as a responsible contractor through due diligence reviews conducted by LACERS.

Level III – Proposed Services and Compensation (“Proposal”)

Firm’s proposed plan of services, and fees for providing the required services are evaluated and ranked by the evaluation panel. Interviews may also be conducted by panel.

Level IV – Final Approval by the Board

The proposer that demonstrates to be the most qualified to provide the required services at the best overall value to LACERS, as determined by the evaluation panel, will be recommended for contract award to the LACERS Board of Administration (Board). The Board, at its sole discretion, makes the final award determination.

EVALUATION CRITERIA	POSSIBLE WEIGHT
<p>Professionalism Proposer demonstrated professionalism in the response to the RFP, such as: RFP presentation, well-written summary of the important features of the RFP, etc.</p>	15
<p>Proposed Scope of Services Description and Methodology Proposer demonstrated strong understanding of LACERS’ objectives and provides a proposed methodology and further refinement of the RFP Scope of Services to meet LACERS objectives, project schedules, and budget.</p>	30
<p>Qualifications, Experience, and Accomplishments</p> <ul style="list-style-type: none"> ✓ Strength of prior experience in conducting RFPs, health plan renewals, performing legislative analysis, program evaluation, strategic planning, communications of public pension systems ✓ Demonstration of expertise in/knowledge of health benefits administration and health care legislation ✓ Strength of favorable references during reference verification process. 	35
<p>Value of Cost The evaluation of the relative cost and value for each firm based upon its submission of the proposed fee schedule by phase and proposed services. This evaluation will also consider cost on a qualitative basis, not necessarily on a quantitative basis. LACERS expects the cost proposal to include details of all costs associated with the scope of services contained in this RFP.</p>	20

TOTAL POINTS	100
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Tentative Schedule:

This schedule indicates estimated dates for the RFP process. LACERS reserves the right to adjust this schedule when appropriate.

<u>Date</u>	<u>Event</u>
April 1, 2022	Release of RFP
April 15, 2022	Deadline for RFP questions
April 27, 2022	RFP question responses posted
May 6, 2022	Deadline for proposal submissions at 3:00 p.m. PST
June 14, 2022	Tentative target date for LACERS Board of Administration consideration of contract award
July 1, 2022	Tentative contract start date

VI. GENERAL CONDITIONS AND COMPLIANCE DOCUMENTS

Proposers are to submit required documents specified in the General Conditions and Compliance Documents (Appendix A). The General Conditions also indicate several standard contracting provisions and requirements of every LACERS and City of Los Angeles contract. You are encouraged to read the documents thoroughly as they may result in additional expense to your firm, such as certain insurance requirements and a Los Angeles Business Tax Registration Certificate. This RFP is for a new contract. Previous document submittals and/or waivers do not apply. New forms must be completed and processed.