

**REQUEST FOR PROPOSALS
FOR
MEDICAL EXAMINATION SERVICES**

ISSUED BY:



**THE RETIREMENT BOARD OF ALLEGHENY COUNTY
542 FORBES AVENUE, ROOM 106
PITTSBURGH, PA 15219
412-350-4674**

March 19, 2026

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1. GENERAL INSTRUCTIONS TO SUPPLIERS

1.1 Purpose of Request for Proposals

The purpose of this document is to provide interested parties with information to enable them to prepare and submit a proposal for the provision of **MEDICAL EXAMINATION SERVICES** (the “RFP”) to the Allegheny County Retirement Board (the “RBAC”). The RBAC intends to use the results of this process to award a contract to one or possibly more successful suppliers.

1.2 About this Document

This document is a Request for Proposal, otherwise referred to as RFP. It differs from an invitation for bid in that the RBAC is seeking a solution, not a quotation, meeting firm specifications for the lowest price. As such, the lowest price proposal shall not guarantee an award recommendation. The electronically received proposals shall be evaluated based upon criteria formulated around the most important features of a product or service, of which quality, testing, references, experience in the field, availability or capability may be overriding factors. Price may not be determinative in the issuance of a contract award. The proposal evaluation criteria should be viewed as a standard that measures how well a supplier’s proposal meets the desired requirements and needs of the RBAC. The criteria considered in evaluating the award are set forth in this document.

The RBAC shall thoroughly review all proposals received. The RBAC shall also utilize its best judgment when determining which suppliers to schedule meetings after receipt of all proposals. The request for proposal process allows the RBAC to negotiate with suppliers prior to awarding a contract. A contract shall be awarded to a qualified responsible supplier(s) submitting the best proposal. The RBAC reserves the right to select, and subsequently recommend for an award, the proposed service which best meets its required needs, quality levels, and budget constraints.

The issuance of this RFP does not obligate the RBAC to enter into contract for any services.

1.3 Terminology

“**Agreement**” means the negotiated contract between the RBAC and the Contractor to provide the Contract Services or Contract Items.

“**County**” identifies the County of Allegheny, Pennsylvania.

“**RBAC**” refers to the Retirement Board of Allegheny County

“**Proposer**” or “**Supplier**” means the person, firm, or corporation that submits a proposal to the Court and RBAC, in response to the RFP, seeking to be selected as the Contractor.

“**Contractor**” means the entity selected by the RBAC to perform the Contract Services or provide the Contract Items.

“**Contract Services**” means the services provided under the Scope of Contract as set forth in Section 2 of the RFP and as finalized, through negotiations, and incorporated into the Agreement.

“**Contract Items**” means the goods provided under the Scope of Contract as set forth in Section 2 of the RFP and as finalized, through negotiations, and incorporated into the Agreement.

“**IME**” means the Independent Medical Examinations performed by an independent physician reviewing the member for disability pension status.

“**MP**” means the Managing Physician that oversees the process and is in direct contact with the RBAC Board staff.

1.4 Issuing Office

This RFP is issued for the RBAC. The Issuing Office is the sole point of contact in the RBAC for this RFP. Please refer all inquiries in writing to.

Point-of-Contact:

Name/Title Walter Szymanski / Director

Walter.Szymanski@AlleghenyCounty.US

Phone 412-350-3256, Fax 412-350-3923

If a contract is entered into as a result of this RFP, it shall be a fixed price contract, unless otherwise stated, on a list of services. The contract shall incorporate by reference this RFP and the General Conditions and Instruction to Suppliers.

1.5 Proposal Delivery, Time, Date and Place

Proposals will be received electronically until **11:30 A.M., E.T., Wednesday, May 13, 2026** for **MEDICAL EXAMINATION SERVICES**.

The RBAC reserves the right to extend or postpone the date and time for accepting proposals through an addendum.

All proposals, responses, inquiries, or correspondence relating to or in reference to this RFP, and all electronic media, reports, charts, and other documentation submitted by supplier shall become the property of the RBAC when received. Nothing submitted shall be considered confidential or proprietary.

1.6 Proposal Submissions

Proposers are required to submit their Proposals electronically via pension@alleghenycounty.us. No Proposals shall be accepted in person, by U.S. Mail, by private courier service, via e-mail communication, telephone or fax transmission.

Proposals must be submitted in the format described in this RFP. To be considered, the proposal must respond to all requirements in the RFP. The contents of this RFP and your proposal shall become part of any contract(s) entered into as a result of this RFP.

The RBAC reserves the right to request additional information which, in the RBAC's opinion, is necessary to assure that the proposer's competence, business organization, and financial resources are adequate to perform in accordance with this RFP and any resultant contract.

The RBAC may make such investigation as it sees fit to determine the ability of the proposer to perform the work, and the proposer shall furnish the RBAC all such information and data for this purpose as requested by the RBAC. The RBAC reserves the right to reject any proposal if the evidence submitted by, or investigation of, such proposer fails to satisfy the RBAC that such proposer is properly qualified to carry out the obligations of the contract and to satisfactorily perform the work specified.

When asked, proposers shall also include their answers to the questions listed in this RFP using the same answering

sequence as put forth in the RFP.

Proposals should be prepared simply and economically, providing a straightforward, concise description of the proposer's ability to meet the requirements of the RFP.

Any other information thought to be relevant, but not applicable to the enumerated questions, should be provided as an appendix to the proposal.

1.7 Clarification of Requirements & General Questions

It is the intent and purpose of the RBAC that this RFP permit competitive proposals. It shall be the supplier's responsibility to advise the point-of-contact if any language, requirements, or any combination thereof, inadvertently restricts or limits the requirements stated in this RFP to a single source.

1.8 Pre-Proposal Meeting

If it is decided that a proposal meeting is necessary, the Board will let the proposer or supplier know in advance.

1.9 Examination of Documents and Requirements

Proposers shall carefully examine all RFP documents and thoroughly familiarize themselves with all requirements prior to submitting a proposal to ensure that the proposal meets the intent of this RFP.

Before submitting a proposal, each proposer shall be responsible for making all investigations and examinations that are necessary to ascertain conditions and requirements effecting the requirements of this RFP. Failure to make such investigations and examinations shall not relieve the supplier from an obligation to comply, in every detail, with all provisions and requirements of the RFP.

1.10 Minority, Women or Disadvantaged Business Enterprise (MWDBE) Requirements.

MWDBE's shall receive equal opportunities to submit proposals and shall not be discriminated against on the grounds of race, color, sex, disability, or national origin in consideration of an award.

A MWDBE is defined as a small business concern which is at least 51% owned and controlled by one or more socially and economically disadvantaged individuals, or in the case of any publicly owned business, at least 51% of the stock of which is owned by one or more socially and economically disadvantaged individuals. Socially and economically disadvantaged include Women, Black Americans, Hispanic Americans, Native Americans, Asian-Pacific Americans, and subcontinent Asian Americans.

A listing of MWDBE's certified by the County and the Pennsylvania Unified Certification Program can be found at <https://www.alleghenycounty.us/equity-inclusion/certified-firms.aspx>

1.11 Veteran Owned Small Business Requirements

Allegheny County has an annual goal of not less than five (5) percent participation by veteran-owned small businesses in all contracts. The participation goal shall apply to the overall dollar amount expended with respect to contracts. The County, therefore, requires that all prospective Contractors demonstrate good faith efforts to obtain the participation of veteran-owned small businesses in work to be performed under County contracts. In order to demonstrate this good faith commitment, all prospective Contractors are required to complete and submit with their proposals an MBE/WBE/Veteran Owned Solicitation and Commitment Form, which details the efforts made by the prospective Contractor to obtain such participation. Failure to submit an MBE/WBE/Veteran Owned Solicitation and

Commitment Form will result in rejection of the proposal.

- A. Veteran-owned small business is defined by the County as a business having one hundred (100) or fewer full-time employees and not less than fifty-one (51) percent of which is owned by one (1) or more veterans, or in the case of any publicly owned business, not less than fifty-one (51) percent of the stock of which is owned by one (1) or more veterans, and the management and daily business operations of which are controlled by one (1) or more veterans. Vendor **MUST** provide proof of veteran ownership including percentage & name and address of business.
- B. For contracts under one hundred thousand dollars (\$100,000.00), veteran-owned small businesses shall be exempt from all bonding requirements.
- C. Attach a copy of vendor(s) DD 214 discharge form to participation statement.

1.12 Conflict of Interest

The proposer shall not accept gifts or anything of value nor enter into any business arrangement with any employee, official or agent of the RBAC.

By signing their proposal, the proposer certifies and represents to the RBAC that the proposer has not offered, conferred or agreed to confer any pecuniary benefit or other thing of value for the receipt of special treatment, advantaged information, recipient's decision, opinion, recommendation, vote or any other exercise of discretion concerning this RFP.

The proposer must complete and sign the attached RBAC's Public Disclosure of Interest in accordance with its Act 44 policy.

1.13 Proposal Preparation Costs

Issuance of this RFP does not commit the RBAC, in any way, to pay any costs incurred in the preparation and submission of a proposal. The issuance of this RFP does not obligate the RBAC to contract for any services. All costs related to the preparation and submission of a proposal shall be paid by the proposer.

1.14 Insurance

The supplier shall obtain and maintain during the life of the Contract, with an insurance supplier rated not less than A- by A.M. Best, authorized to do business in the Commonwealth of Pennsylvania, the following insurance requirements:

Automobile Liability. Bodily injury and property damage liability covering all non-owned and hired automobiles for limits of not less than \$1,000,000 bodily injury each person, each accident and \$1,000,000 property damage, or \$1,000,000 combined single limit - bodily injury and property damage. Bodily injury and property damage liability covering all owned automobiles for limits of not less than \$300,000 bodily injury each person, each accident and \$300,000 property damage, or \$300,000 combined single limit – bodily injury and property damage.

Commercial General Liability. Bodily injury and property damage liability as shall protect the Supplier and any subcontractor performing work under the Contract, from claims of bodily injury or property damage which arise from operation of the Contract, whether such operations are performed by the supplier, any subcontractor, or anyone directly or indirectly employed by either. The amounts of such insurance shall not be less than \$1,000,000 bodily

injury each occurrence/aggregate and \$1,000,000 property damage each occurrence/aggregate, or \$1,000,000 bodily injury and property damage combined single limits each occurrence/aggregate. This insurance shall include coverage for products, operations, personal injury liability and contractual liability, assumed under the indemnity provision of the Contract.

Professional Liability. (Required for Professional Services Only) Coverage as shall protect the Supplier and any subcontractor performing work under the Contract, from claims errors and omissions which arise from operation of the Contract, whether such operations are performed by the Supplier, any subcontractor, or anyone directly or indirectly employed by either. The amounts of such insurance shall not be less than \$1,000,000 each occurrence/aggregate and \$1,000,000 excess liability, each occurrence/aggregate.

Worker's Compensation and Employers Liability. The supplier shall meet the statutory requirements of the Commonwealth of Pennsylvania, \$100,000 per accident limit, \$500,000 disease per policy limit, \$100,000 disease each employee limit.

Proof of Insurance. The supplier shall not commence any work in connection with the Contract until it has obtained all of the foregoing types of insurance and proof of such insurance has been approved by RBAC. The supplier shall not allow any subcontractor to commence work on its subcontract until all similar insurance required of the subcontractor has been obtained and approved.

Deductibles. The RBAC shall be exempt from, and in no way liable for any sums of money, which may represent a deductible in any insurance policy. The payment of such deductible shall be the sole responsibility of the supplier and/or subcontractor providing such insurance.

Additional Insured. The RBAC shall be named as an additional insured for operations or services rendered under the general liability coverage. The supplier's insurance shall be primary of any self-funding and/or insurance otherwise carried by the RBAC for all loss or damages arising from the supplier operations under this agreement. Certificates of such insurance will be furnished to the RBAC and shall contain the provision that the RBAC be given thirty (30) days written notice of any intent to amend or terminate by either the insured or the insuring supplier.

Documents. Should any or all of the required insurance coverage be self-funded/self-insured, a copy of the Certificate of Self-Insurance or other documentation from the County Department of Insurance shall be furnished. If any part of the work under the Contract is sublet, the subcontractor shall be required to meet all insurance requirements set forth in the Contract, provided that types and amounts of insurance to be maintained by each subcontractor shall be adjusted to an amount reasonably necessary to cover the risks associated with such subcontractor's role in the project. The parties stipulate that the supplier shall maintain each type of insurance set forth above at a coverage level equal to at least half of the amount set forth above for such type of insurance. However, nothing contained herein shall relieve the supplier from meeting all insurance requirements or otherwise being responsible for the subcontractor.

No program of self-insurance shall apply to any of the foregoing coverages without prior approval of the RBAC.

The successful proposer shall be responsible to require any subcontractors to comply with all of the insurance requirements of this agreement.

The Chief Purchasing Officer may waive or modify any of the insurance requirements at his discretion.

1.15 Option to Extend

The RBAC, reserves the right, upon notice to the supplier, to extend the Agreement or any part of the Agreement for up to two (2) years, upon the same terms and conditions after the indicated expiration date as described in the

Agreement. This shall be utilized to prevent a lapse in Agreement coverage for the services indicated on the Agreement, and only for the time necessary to enter into a new Agreement. When applicable, an extension notice shall be issued defining the exact extension of the Agreement; all other terms and conditions of the extended Agreement shall remain in full force and effect.

1.16 Right to Terminate

The RBAC retains the right to terminate any contract(s) resulting from this solicitation upon thirty (30) days written notice.

2. SCOPE OF CONTRACT

2.1 Background

The RBAC administers the Employees' Retirement System of Allegheny County, Act of July 28, 1953, P.L. 723, Art. XVII, §§ 1701 et seq., as amended, 16 P.S. §§ 4701-4716 (the "Act"), including the approval or disapproval of all applications for a disability pension and review of existing disability pensions under the terms of the Act.

The RBAC is requesting proposals from qualified Independent Medical Examiners and is currently seeking bids from qualified vendors to perform Medical Examination Services that review Disability Pension Requests. The RBAC realizes the need to appoint qualified practicing physicians from Allegheny County to provide opinions and sworn Statements as to the mental incapacity or total and permanent physical disability of an applicant for a disability pension.

2.2 General Requirements

The RBAC is seeking a proposer(s) to: to evaluate those member employees who have applied for a disability pension, and will facilitate the intake, review, and Re-examination of previously disabled cases of all such independent medical examinations and deliver the final opinion and sworn certification of each physician to the Board in an efficient and timely manner utilizing the forms as designated by the Board.

2.3 Scope of Work – General

- A. Provide opinions and sworn Statements as to the mental incapacity or total and permanent physical disability of an active member of the plan (applicant) for a disability pension.
- B. The Proposer must identify and provide a list of credentials for all Physicians. The Board requires the proposer to have a Managing Physician and a minimum of five Examining Physician(s). A minimum of three examining physicians are required to review each case file and examine the applicant. The Managing Physician must submit a report to the Board on the results of the examinations with sworn certifications. (An instruction brochure will be provided that outlines the responsibilities as to report preparation and delivery, timing requirements, professional behavior and ethics, along with format guidelines that will enable the Board to assess each petitioner's status.)
- C. The Physicians must be proficient in making judgments on applications. Disabilities can vary and range from a physical condition to a mental condition that prevents the applicant from gainful employment.
- D. The Board staff shall provide the Managing Physician(s) with an email notification for each request for an application of disability benefits through the intake process.
- E. The Managing Physician will then begin the task of sending all requisite forms to the applicant for completion to enable the review process to proceed.
- F. Each month, prior to the Board Materials production, the Managing Physician will email the confidential informational dashboard along with all pertinent Case notes and activities to date to the RBAC staff. The MP has the obligation in the intake process to make continual efforts to maintain contact with each applicant and will follow guidelines as hereto attached. Once the intake process has been deemed complete, the petitioner status shall progress to the review process for evaluations. After careful review of the disability application, the IME provides the names of three qualified practicing physicians from Allegheny County based on the reason(s) provided on the petitioner application for disability (physical or mental or both) and will appoint them to perform IME's and provide their professional opinions and sworn certifications.

- G. When any new IME Assigned Physician(s) is added to provide evaluation services, the proposer will forward the name(s) of the physician(s) and their credentials in writing to the Board through its Director. Once the doctors have been designated, MP will promptly notify the Director in writing or by e-mail. If one or more physician(s) is not able to review the case for any reason MP will provide additional names until three physician(s) have been appointed.
- H. MP will then proceed to coordinate the independent medical evaluations for each applicant for whom three physician(s) have been designated. If MP determines that there is insufficient or inadequate medical documentation, the Director of the Board will be notified immediately, with confirmation in writing. The Director shall notify the applicant of the information needed and request that same be provided forthwith.
- I. Once the three physicians have been designated, it is the responsibility of MP to schedule the appointments with each designated physician, to efficiently deliver all records and documents to the examining physician(s), and to notify the Director of the Board of all scheduled appointments. These efforts must be completed by MP as early as is practical to the scheduled appointments. MP will have the responsibility of providing A CERTIFIED RETURN RECEIPT notice and via regular mail to the employee applicant of the doctors designated and forwarding the information packet which will include a letter of introduction, directions to the physician's office, and reminders of responsibilities and duties of the petitioner. Copies of those letters will be emailed to the RBAC for their files.
- J. The MP will ensure that each physician(s) shall return all pertinent medical records back to the MP on a timely basis. MP shall obtain an opinion and sworn certification from each physician on the forms provided by the Board. MP shall forward those opinions and sworn certifications of the physician(s) to the Director. The Board shall be responsible to MP for the requisite cost of the IME's performed by the physician(s).
- K. MP will assemble all supportive historical medical records, opinions and sworn statements of examining physicians, and other such related documents and issue a summary unified document that contains a summary recommendation and concludes the case. All documents will then be forwarded to the Director by the MP along with a copy of the member's disability pension application.

3. PRICE

Provide a fee quote for the services requested in the Scope of Work section of this RFP. Describe and clearly propose implementation fees, if any, that your firm intends to charge the client.

4. EVALUATION CRITERIA

4.1 Evaluation Process

All proposals are subject to be evaluated by the point-of-contact, or an evaluation committee made up of RBAC representatives and/or an independent consultant.

The RBAC uses the concept of “Best Value” in evaluating proposals. “Best Value” means the overall combination of quality, price and various elements of required services that in total are optimal relative to the RBAC’s needs and most advantageous.

4.2 Additional Information

Suppliers to this RFP may be required to submit additional information that the RBAC may deem necessary to further evaluate the supplier’s qualifications.

4.3 Award Criteria I

Suppliers are not to inflate prices in the initial proposal as cost is one of the factors in determining who may receive an award or be invited to formal negotiations.

Additionally, proposals shall be based on:

- a) Response format as required by this RFP.
- b) Adequacy and completeness of proposal.
- c) Supplier’s understanding of the service and nature of the work to be performed.
- d) Compliance with the terms and conditions of the RFP.
- e) Experience in providing like services.
- f) Qualified staff.
- g) Methodology to accomplish tasks.
- h) Supplier’s specialized experience with the application involved.
- i) References which support successful prior experience.
- j) Supplier’s staff assigned to the service and their experience in successful implementation of the applications involved.
- k) Number of staff qualified to fulfill contract tasks.
- l) Supplier’s current workload with other customers with respect to available staff.
- m) Supplier’s demonstration of its understanding of the RBAC’s objectives and innovation of their approach to solving requirements.
- n) Supplier’s track record for successful implementation of similar work.
- o) Cost.

4.4 Award Criteria II (Responsibility)

In determining the responsibility of a supplier, the following criteria shall be considered:

- a) The ability, capacity and skill of the proposer to perform the contract or provide the services required.
- b) Whether the supplier can perform the contract or provide the service promptly, or within the time specified, without delay or interference.
- c) The character, integrity, reliability, reputation, judgment, experience and efficiency of the proposer.
- d) The quality of performance on previous contracts or services.
- e) The previous and existing compliance by the supplier with laws and ordinances relating to the contract or service.

- f) The sufficiency of the financial resources and ability of the supplier to perform the contract or provide the service.
- g) The number and scope of the conditions attached to the proposal.
- h) Whether the supplier is in arrears to the RBAC on a debt or contract or is in default on a surety to the RBAC or whether the supplier's County taxes or assessments are delinquent.
- i) Such other information that the RBAC may secure that has a bearing on the decision to award the contract.

AWARD CRITERIA (Another template / option to follow)

Each proposal shall be evaluated by a Selection Committee, appointed by the Retirement Board of Allegheny County. The Committee shall use the following criteria to determine which vendor is capable of implementing the requirements outlined in the RFP. However, the Committee, in its sole discretion, may use other criteria to make its decision and is not limited to the items listed below:

- A. The supplier's experience with and ability to do the specific work, including experience in the administration of Medical Examination Services.
- B. The supplier's understanding of the plan's purpose and scope, as evidenced by the proposal approach and level of effort.
- C. Competitiveness of proposed costs to participants.
- D. Availability and competence of personnel with the appropriate training and compensation responsible for the Medical Examination Services.
- E. Conformity with the specifics outlined in the RFP.

VII. PROPOSAL EVALUATION PROCESS

During the evaluation process, RBAC may identify areas in submitted proposals where additional information or clarification may be needed. If required, RBAC, will provide each Proposer that it deems reasonably qualified with a description of issues to be explored. These areas may include fees, availability of personnel, or any other matter the evaluation committee may need further information about for their assessment. These issues may be exclusive to each Proposer that RBAC deems reasonably qualified.

Proposals will be screened initially to determine if they satisfy the Minimum Qualifications. Proposals that are non-compliant will be eliminated. After Minimum Qualifications have been satisfied, the evaluation criteria will be as follows:

- A. **Ability.** The Proposer's ability to provide the requested services.
- B. **Related Experience.** The Proposer's demonstrated, related experience providing services comparable to RBAC's needs.
- C. **Qualified Personnel** assigned to provide necessary services.
- D. **Business Stability.** The Proposer's stability, professionalism and reputation as compared to other vendors providing custodian services, and demonstrated ability to effect smooth succession in the event of the departure of key persons.
- E. **Assigned Individuals.** The credentials and experience of the person(s) who would be assigned to RBAC.
- F. **Fee Proposal.** Reasonableness and competitiveness of the fee structure/costs proposed by the Proposer.

- G. General Quality and adequacy of Proposal**, including completeness of response, conformity to terms and conditions, and written plan to effectively and timely deliver on scope of services.
- H. Quality of References.** Level of satisfaction of present and/or former clients.
- I. Other Factors.** Any other factors that would be in the best interest of RBAC that were not previously described.

As stated above, respondents may be required to provide an oral presentation, followed by a question and answer session. The number of finalists to be selected for an oral presentation has not been determined; however, the number is not expected to exceed three. Any such presentations shall be at no cost to the RBAC.

In addition, selection shall be conditioned upon a site visit by up to three members of the selection committee, to be conducted at a mutually agreed date and time. All expenses incurred by the members of the selection committee for this site visit shall be borne entirely by the administrator and shall be considered a cost of responding to the RFP.

It is the RBAC's expectation that upon successful conclusion of contract negotiations, that the selected administrator shall implement the transition work plan outlined in their response to this RFP for an effective date of 01/01/27.

The RBAC reserves the right to award in part, to reject any and all proposals in whole or in part, and to waive technical defects, irregularities and omissions if, in its judgment, the best interests of the RBAC shall not be served.

4.5 Final Award Process

A shortlist of proposers may be determined. These short-listed proposers may be scheduled for a structured oral presentation or interview. Any such presentations shall be at no cost to the RBAC. The RBAC also reserves the right to visit the proposer's facilities, offices and warehouses. The oral interview may be recorded or videotaped. At the end of the oral presentation/interview process, the evaluation of the respondents shall be completed. At this time the supplier(s) deemed most advantageous to the RBAC shall be chosen.

5. TERMS OF CONTRACT

5.1 Period of Contract

The period of contract shall be for five years with two options for the RBAC to renew for two-year (maximum combined period of seven (7) years).

The RBAC retains the right to terminate any resulting contract upon thirty (30) days written notice.

5.2 Public Disclosure of Interests

The Contractor shall provide the disclosures required by the RBAC's Public Disclosure of Interest in Accordance with Act 44 Policy. A copy of the policy and form can be found at Pension Fund - Allegheny County, PA. As a prospective contractor, you are required to respond to all questions on pages 1 through 3, which includes Section A, and to execute the signature/verification page. Proposers are not required to respond to Section B of the form.