



SOQ No. 26-011

Provide Actuarial and Consulting Services for Jefferson Parish

**Submission Deadline: April 16, 2026 at 3:30 PM**

**ATTENTION VENDORS!!!**

**Please review all pages and respond accordingly, complying with all provisions in the public notice and Jefferson Parish Code of Ordinances Section 2-926 et seq. All submissions must be received on the Purchasing Department's e-Procurement site, [www.jeffparishbids.net](http://www.jeffparishbids.net), by the SOQ submission deadline date and time. Late submissions will not be accepted.**

Jefferson Parish Purchasing Department  
General Government Building  
200 Derbigny Street, Suite 4400  
Gretna, LA 70053

Purchasing Specialist II: Sean Dumas  
Purchasing Specialist II: [Sean.Dumas@jeffparish.gov](mailto:Sean.Dumas@jeffparish.gov)  
Purchasing Specialist II: (504)-364-2808

**PUBLIC NOTICE**  
**SOQ 26-011**

**Provide Actuarial and Consulting Services for Jefferson Parish**

The Parish of Jefferson, authorized by **Resolution No.148269** is hereby soliciting the submittal of Statements of Qualifications (General Professional Services Questionnaire) from qualified firms desiring to provide the Parish with actuarial and consulting services for Jefferson Parish, Jefferson Parish Hospital Service District 1 and Jefferson Parish Hospital Service District 2. (Parishwide).

**Deadline for Submissions: 3:30 p.m., April 16, 2026**

**General**

All Services are to be carried out under the direction of the Director of Risk Management, and the Insurance Advisory and Coordination Committee, or their designated representative(s). The Firm shall represent and remain committed to acting in the best interest at all times on behalf of the Parish of Jefferson as its Actuarial Consultant and shall provide The Parish of Jefferson with his/her proposed actuarial and advice on the matters listed below: or those usually implied as a prerequisite for performance of the services whether or not specifically mentioned in this Scope of Services:

- 1) The parish's total liability as of December 31 each year for all self-insured losses incurred but not paid.
- 2) The amount of funding required to pay self-insured claims cost that are projected to come due by December 31 each year.
- 3) The amount of funding required to pay self-insured claims cost (for all years) that are projected to be incurred for the fiscal year January 1, through December 31.
- 4) The self-insured losses incurred for each fiscal year beginning January 1, 1989.
- 5) The potential for actual losses to vary from the actuarial estimates.
- 6) The adequacy of current funding levels and the amount of funds escrowed to pay current claims.
- 7) The efficiency and effectiveness of the parish's current system and procedures in claims reporting, data collection and data management.
- 8) The amounts and methods of recognizing general liability (including public official errors and omissions) automobile liability and workers' compensation liabilities in conformance with Governmental Accounting Standards Board (GASB) rule 10.
- 9) At the request of the Client, consultant shall provide the following services:
  - A. An evaluation of the parish's overall management of current risk financing techniques and recommendations for improvement.
  - B. A review of all Parish Bond issues and certification of compliance with and for financial institutions.
  - C. An Evaluation of the efficiency and effectiveness of Client's current systems and procedures in claims reporting, data collection and data management
  - D. An evaluation of current and proposed insurance policy(ies).
  - E. Insurance marketplace investigations.
  - F. Updates and verifications of building and contents replacement cost values for insurance purposes.
  - G. Preparation of the Parish's application for the Louisiana insurance Commissioner's Certification process relayed to its FEMA Public Assistance obtain and maintain requirements.

- H. Managing insurance claims, including but not limited to; providing building inspections, order of magnitudes and scoped estimates and including property related adjusting services as needed.
- I. Any other matters which may be pertinent to Jefferson Parish's self-insured and fully insured programs including cost and efficiency of litigation processes.

**Minimum Requirements for Selection**

- 1. The selected consultant will be a firm with at least two employees who are members of the American Academy of Actuaries.
- 2. The proposal shall include identification of personnel to be involved in the project, including their professional qualifications and experience. It shall also include a description of the firm's local (Jefferson and surrounding parishes) presence, including local offices, personnel, clients, etc. and the firm's most recent Financial Statement.
- 3. A list of five to eight clients for whom similar projects have been performed. Please indicate whether the personnel involved in the Parish of Jefferson's evaluation have had a major role in providing these professional services.

**Evaluation Criteria**

The following criteria shall be used to evaluate each firm submitting a Statement of Qualifications:

Professional Training and Experience	25	points;
Nature, quality and value of Prior Parish Work	25	points;
Scope of Services	25	points;
Past Performance of Public Contracts	15	points;
Location of office	10	points;
 TOTAL	 <u>100</u>	 points

The person or firm submitting a Statement of Qualification (General Professional Services Questionnaire) must identify all subcontractors who will assist in providing professional services for the project, in the professional services questionnaire. Each subcontractor shall be required to submit a (General Professional Services Questionnaire) and all documents and information included in the questionnaire. (Refer to Jefferson Parish Code Ordinance, Section 2-928)

All persons or firms (including subcontractors) must submit a Statement of Qualifications (General Professional Services Questionnaire) by the deadline. The latest professional services questionnaire may be obtained by contacting the Purchasing Department at (504) 364-2678 or via the Jefferson Parish website at <https://www.jeffparish.gov/468/Statement-of-Qualifications-SOQ>.

Submissions will only be accepted electronically via Jefferson Parish's e-Procurement site, Central Bidding at [www.centralauctionhouse.com](http://www.centralauctionhouse.com) or [www.jeffparishbids.net](http://www.jeffparishbids.net). Registration is required and free for Jefferson Parish vendors by accessing the following link: [www.centralauctionhouse.com/registration.php](http://www.centralauctionhouse.com/registration.php).

No submittals will be accepted after the deadline.

Affidavits and Insurance are not required to be submitted with the Statement of Qualifications, but shall be submitted prior to contract approval.

Disputes/protests relating to the decisions by the evaluation committee or by the Jefferson Parish Council shall be brought before the 24<sup>th</sup> Judicial Court.

(Parishwide)

**ADV: The New Orleans Advocate: April 1 and 8, 2026**

# **Statement of Qualifications Affidavit Instructions**

This affidavit is supplied as a courtesy to Affiant. It is the responsibility of the affiant to insure the affidavit submitted to Jefferson Parish complies, in both form and content, with federal, state and parish laws. It is the responsibility of the Affiant to submit a new affidavit if any additional campaign contributions are made after the affidavit is executed but prior to the time the council acts on the matter.

**The Affidavit MUST comply with the following requirements to be accepted.**

- Must be signed by an authorized representative of the entity.
- Must be notarized by a notary with proper jurisdiction who must sign and print name, and include bar/notary number.
- Location where the notarization is taking place should be filled in at the top of the affidavit – not the location of the contract services.
- MUST select either Choice A or B when required.
- If choice A is selected, it must include an attachment.

**Affidavits with the following WILL NOT be accepted.**

- If both choice A and B are selected, the affidavit will not be accepted.
- An affidavit marked N/A will not be accepted.
- An affidavit missing attachment(s) when required will not be accepted.
- An affidavit that is notarized by a notary who does not have jurisdiction in the place where notarized or is not active will not be accepted.
- Affidavits that are older than six (6) months will not be accepted.

*Instruction sheet may be omitted when submitting the affidavit.*

**Statement of Qualifications**

**AFFIDAVIT**

STATE OF \_\_\_\_\_

PARISH/COUNTY OF \_\_\_\_\_

BEFORE ME, the undersigned authority, personally came and appeared: \_\_\_\_\_  
\_\_\_\_\_, (Affiant) who after being duly sworn by me, deposed and said that  
he/she is the fully authorized \_\_\_\_\_ of \_\_\_\_\_ (Entity),  
who submitted a Statement of Qualifications (SOQ) to the Parish of Jefferson to \_\_\_\_\_  
\_\_\_\_\_ (Briefly describe the services.).

Affiant further said:

Campaign Contribution Disclosures

**(Choose A or B, if option A is indicated please include the required attachment):**

**Choice A** \_\_\_\_\_ Attached hereto is a list of all campaign contributions, including the date and amount of each contribution, made to current or former elected officials of the Parish of Jefferson by Entity, Affiant, and/or officers, directors and owners, including employees, owning 25% or more of the Entity during the two-year period immediately preceding the date of this affidavit. Further, Entity, Affiant, and/or Entity Owners have not made any contributions to or in support of current or former members of the Jefferson Parish Council or the Jefferson Parish President through or in the name of another person or legal entity, either directly or indirectly.

**Choice B** \_\_\_\_\_ There are **NO** campaign contributions made which would require disclosure under Choice A of this section.

Affiant further said:

Debt Disclosures

**(Choose A or B, if option A is indicated please include the required attachment):**

**Choice A** \_\_\_\_\_ Attached hereto is a list of all debts owed by the affiant to any elected or appointed official of the Parish of Jefferson, and any and all debts owed by any elected or appointed official of the Parish to the Affiant.

**Choice B** \_\_\_\_\_ There are **NO** debts which would require disclosure under Choice A of this section.

Affiant further said:

Solicitation of Campaign Contribution Disclosures

**(Choose A or B, if option A is indicated please include the required attachment):**

**Choice A** \_\_\_\_\_ Attached hereto is a list of all elected officials of the Parish of Jefferson, whether still holding office at the time of the affidavit or not, where the elected official, individually, either by **telephone or by personal contact**, solicited a campaign contribution or other monetary consideration from the Entity, including the Entity's officers, directors and owners, and employees owning twenty-five percent (25%) or more of the Entity, during the two-year period immediately preceding the date the affidavit is signed. Further, if known to the Affiant, the date of any such solicitation shall be included on the attached list.

**Choice B** \_\_\_\_\_ There are **NO** solicitations for campaign contributions which would require disclosure under Choice A of this section.

Affiant further said:

Subcontractor Disclosures

**(Choose A or B, if option A is indicated please include the required attachment):**

**Choice A** \_\_\_\_\_ Affiant further said that attached is a listing of all subcontractors, excluding full time employees, who may assist in providing professional services for the aforementioned SOQ.

**Choice B** \_\_\_\_\_ There are **NO** subcontractors which would require disclosure under Choice A of this section.

Affiant further said:

That Affiant has employed no person, corporation, firm, association, or other organization, either directly or indirectly, to secure the public contract under which he received payment, other than persons regularly employed by the Affiant whose services in connection with the construction, alteration or demolition of the public building or project or in securing the public contract were in the regular course of their duties for Affiant; and

*[The remainder of this page is intentionally left blank.]*

That no part of the contract price received by Affiant was paid or will be paid to any person, corporation, firm, association, or other organization for soliciting the contract, other than the payment of their normal compensation to persons regularly employed by the Affiant whose services in connection with the construction, alteration or demolition of the public building or project were in the regular course of their duties for Affiant.

\_\_\_\_\_  
Signature of Affiant

\_\_\_\_\_  
Printed Name of Affiant

SWORN AND SUBSCRIBED TO BEFORE ME

ON THE \_\_\_\_\_ DAY OF \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Notary Public

\_\_\_\_\_  
Printed Name of Notary

\_\_\_\_\_  
Notary/Bar Roll Number

My commission expires \_\_\_\_\_.