

**STATEMENT OF WORK
CONSULTING SERVICES
INVITATION TO QUALIFY (ITQ) CONTRACT**

OVERVIEW: The purpose of the Consulting Services ITQ is to qualify responsible and responsive Contractors to perform consulting services to Commonwealth of Pennsylvania’s executive agencies. In addition, Local Public Procurement Units, as defined by the Commonwealth Procurement Code, may use this contract in accordance with the COSTARS Provision contained in the terms and conditions.

Staff augmentation is not permitted under this contract.

ISSUING OFFICE: This ITQ is managed and administered by the Commonwealth of Pennsylvania, Department of General Services (DGS) Bureau of Procurement. All inquiries should be referred to:

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QUALIFICATIONS: Contractors interested in becoming an ITQ Contractor must meet the following requirements. Failure to meet the below requirements will result in the application being rejected. Each Contractor that meets the minimum qualifications will be awarded a contract. Award of a contract to a Contractor is not a guarantee of business.

- A. Contractors must provide documentation showing two (2) years of experience in the appropriate commodity code selected under Service Categories.
- B. If the following commodity code is selected below, Contractor must provide proof they are a member of the American Academy of Actuaries or the Society of Actuaries:
 - 84160000-ITQ-37-Actuarial Services - Actuarial Consultant Pensions/Investment Part 2
 - 84100000-ITQ-38-Actuarial Services – Actuarial Consultant Financial Area 1
 - 84100000-ITQ-39-Actuarial Services - Actuarial Consultant Financial Area 2
 - 84130000-ITQ-40-Actuarial Services - Actuarial Consultant Healthcare/Medical Area 1
 - 84130000-ITQ-41-Actuarial Services - Actuarial Consultant Healthcare/Medical Area 2
 - 84160000-ITQ-42-Actuarial Services - Actuarial Consultant Pensions/Investment Area 1
- C. If commodity code *84130000-ITQ-43-Actuarial Services- Actuarial Consultant Medical Professional Liability Area 2*, Contractor must provide documentation the lead consultant is a member of the Casualty Actuary Society.

SERVICE CATEGORIES: Contractors will need to choose the appropriate commodity code(s) to qualify for this contract. Contractors will select the appropriate code(s) under the Business Details section of the qualification process. The Commonwealth may add additional commodity codes as the need arises. The table below lists the appropriate commodity code and description of each service category.

COMMODITY CODE	DESCRIPTION OF SERVICE CATEGORY
84110000-ITQ-33 Accounting Services - General	Commonwealth Agencies have identified the need for professional accountant firms with the education and expertise to provide these or similar services: <ul style="list-style-type: none"> • Cash Basis and Accrual Basis Accounting. • Cost Accounting. • Financial Accounting. • External Accounting. • Management Accounting. • Project Accounting. • Positive Accounting. • Social and Environmental Accounting. • Tax Accounting. • Forensic Accounting. • Bookkeeping. • Consultations/Advisory Services. • Budget Comparisons; and • Projections or Forecasts
84110000-ITQ-34 Accounting Services - Tax accounting and Auditing – federal	Conduct analysis of complex federal tax provisions commonwealth agencies. Areas of federal tax expertise include but are not limited to: <ul style="list-style-type: none"> • Individual income taxation. • Corporate taxation. • Excise taxes; and • Employment taxes including FICA and unemployment. Analyses can include policy review and recommendations; impact statements for the Commonwealth of new or potential federal changes; identification of process improvements; and opportunities for Federal-State cooperation.
84110000-ITQ-35 Accounting Services - Tax accounting and Auditing – state and local	Conduct analysis of Pennsylvania and other states’ state and local tax provisions for Commonwealth agencies. Areas of expertise include but are not limited to: <ul style="list-style-type: none"> • Individual income taxation. • Corporate taxation. • Excise taxes; and • Employment taxes including FICA and unemployment Analyses can include policy review and recommendations; impact statements for the Commonwealth of new or potential state changes; identification of process improvements; and opportunities for State-Local cooperation. Perform state and local tax audits on behalf of commonwealth agencies.
84110000-ITQ-32	Conduct economic, statistical, finance or accounting analysis of Commonwealth

<p>Accounting Services - Decision analytics and predictive modeling</p>	<p>agency policies and/or operations including:</p> <ul style="list-style-type: none"> • Cost benefit. • Return on investment. • Optimization. • Correlation. • Regression; and • Other analytical application. <p>Develop, implement, and/or maintain analytical models for use by Commonwealth agencies to conduct or assist with identification/selection of “next best” or “best fit” cases and predict program participant behavior and/or Commonwealth program results.</p>
<p>84110000-ITQ-29 Accounting Services - (Tax) Technical forms and instruction writing</p>	<p>Provide services to simplify and clarify forms and instructions.</p>
<p>84110000-ITQ-30 Accounting Services - Accounting and auditing functions of Gaming systems and operations</p>	<p>Provide financial consulting services to the Gaming industry and its impacts on Pennsylvania including program revenue as well as communities and citizens.</p>
<p>84110000-ITQ-36 Accounting Services- Fraud Detection and Identity Validation Services</p> <p>-claims, returns, and applications made to increase Commonwealth payments or decrease liabilities to the Commonwealth</p>	<p>Conducts analyses of program or tax requirements, business processes and data of program applicant or tax filer to detect:</p> <ul style="list-style-type: none"> • Identify fraud. • Understated or unreported income or other tax base. • Overstated tax credits; and • Overstated claimed program benefits <p>Provide fraud detection and identity validation solutions required to reduce acceptance and revenue loss due to fraudulently filed claims, returns and applications.</p> <p>Tax return filings and program benefit applications can be fraudulently misrepresented to the filer's benefit and failure to detect these intentional erroneous filings negatively impacts the Commonwealth. The consulting engagements may involve analyses utilizing agency internal data and/or external economic, demographic and financial data, quantitative modeling methods and include a consultant's software/hardware solutions.</p>
<p>84110000-ITQ-31 Accounting Services - Cost accounting</p>	<p>Evaluation of the overall costs associated with Commonwealth operations and programs to determine efficiency and cost effectiveness. This analysis is utilized to determine what type and how much expenses are involved with maintaining the current structure and practices OR to project changes to these costs in the event that specific changes are considered/implemented.</p>

<p>84160000-ITQ-42 Actuarial Services - Actuarial Consultant Pensions/Investment Area 1</p>	<p>Retirement/Pension; Investment; Consultations/Advisory Services; Cash Flow Testing; Forecasting and Experience Reporting; Reserve Processing and Benchmarking Studies.</p>
<p>84160000-ITQ-37 Actuarial Services - Actuarial Consultant Pensions/Investment Part 2</p>	<p>Retirement/Pension; Investment; Consultations/Advisory Services; Cash Flow Testing; Forecasting and Experience Reporting; Reserve Processing and Benchmarking Studies.</p> <p>Actuarial supplier must be able to perform actual services for investment plans, financial, or similar services that will have an annual expenditure in excess of \$1 Billion.</p>
<p>84100000-ITQ-38 Actuarial Services – Actuarial Consultant Financial Area 1</p>	<p>Finance; Marketing; Risk; Business; Cash Flow Testing; Forecasting and Experience Reporting; and Reserve Processing.</p>
<p>84100000-ITQ-39 Actuarial Services - Actuarial Consultant Financial Area 2</p>	<p>Finance; Marketing; Risk; Business; Cash Flow Testing; Forecasting and Experience Reporting; and Reserve Processing.</p> <p>Actuarial supplier must be able to perform actual services for investment plans, financial, or similar services that will have an annual expenditure in excess of \$1 Billion.</p>
<p>84130000-ITQ-40 Actuarial Services - Actuarial Consultant Healthcare/Medical Area 1</p>	<p>Employee Benefits, including, but not limited to, insured and self-insured health care coverage, Medicare, dental, prescription, vision, Workers Compensation and Workers Compensation excess, life, auto, home, long term care, disability, accident, optional insurance programs, dependent care account programs, commuter benefits and similar benefit plans.</p> <p>Suppliers must be able to provide a minimum professional experience in the actuarial consultant field; guidance on the requirements evolving from federal legislation impacting commonwealth programs such as IRS regulations, HIPAA, COBRA, MHPAE, and PPACA; must be able to provide expert testimony regarding the analysis of any or all of the above programs, for the purposes of the commonwealth's collective bargaining negotiations; must prepare quarterly projections that will be used for budgeting purposes; and may be asked to perform a GASB-45 valuation of the REHP and RPSPP.</p>
<p>84130000-ITQ-41 Actuarial Services - Actuarial Consultant Healthcare/Medical Area 2</p>	<p>Employee Benefits, including, but not limited to, insured and self-insured health care coverage, Medicare, dental, prescription, vision, Workers Compensation and Workers Compensation excess, life, auto, home, long term care, disability, accident, optional insurance programs, dependent care account programs, commuter benefits and similar benefit plans.</p> <p>Suppliers must be able to provide a minimum professional experience in the actuarial consultant field; guidance on the requirements evolving from federal legislation impacting commonwealth programs such as IRS regulations, HIPAA, COBRA, MHPAE, and PPACA; must be able to provide expert testimony regarding the analysis of any or all of the above programs, for the purposes of the commonwealth's collective bargaining negotiations; must prepare quarterly projections that will be</p>

	<p>used for budgeting purposes; and may be asked to perform a GASB-45 valuation of the REHP and RPSPP.</p> <p>Actuarial supplier must be able to perform actual services for a health care plan or similar services that will have an annual expenditure in excess of \$1 Billion.</p>
<p>84130000-ITQ-43 Actuarial Services- Actuarial Consultant Medical Professional Liability Area 2</p>	<p>Commonwealth of Pennsylvania medical professional liability actuarial analysis including, but not limited, to preparing the Mcare annual assessment rate pursuant to statutory requirements, preparing Mcare annual hospital modification factor and report which is applied to the annual assessment rate for each hospital, and preparing the Mcare annual unfunded liability analysis and report.</p> <p>Actuarial supplier must have the experience, staffing, and technology to perform actuarial services for a Pennsylvania medical professional liability special fund that has projected financial obligations in excess of \$1 billion; every other year the actuarial supplier must be able to provide analysis of the data call submissions from carriers and risk retention groups and other support on an as requested basis to assist the Commissioner in determining whether there is sufficient capacity in the medical professional liability insurance market for an increase in the primary insurance limits as provided for in <u>Act 13 of 2002</u>; must be able to analyze the financial effects of changing limits, including but not limited to, increased limits factors and changes to Mcare’s projected unfunded liability; must be able to analyze prior and current loss data, payments on closed claims, reported claim data and pending claim data for all provider types; must be able to research medical professional liability underwriting cycles, various economic indices as well as provide analysis, modeling, consulting, and be capable of coordinating implementation, transitions and operational efforts of any combination of additional service(s) that is required.</p>
<p>84110000-ITQ-44 Arts (non-profit)</p>	<p>Services required include: providing technical assistance to non-profit arts organizations, arts programs, artists and arts in education providers in the areas of business and finance, strategic planning, marketing, technology, facilitation, training, and arts in education and artistic leadership. Contractors will work under the direction of the Pennsylvania Council on the Arts leadership.</p>
<p>84110000-ITQ-47 Auditing Services - General</p>	<p>Commonwealth Agencies have identified the need for professional Auditors with the education, knowledge and expertise to provide the following services, but not limited to:</p> <ul style="list-style-type: none"> • External Audits. • Auditing Reporting. • Single Audit. • Clinical Audits. • Environmental Audits. • Financial Audits. • Agent Audits. • Taxes. • Consultations/Advisory Services; and • Special investigations

<p>84110000-ITQ-46 Auditing Services - Financial and Financial Related Audit Services</p>	<p>Financial audits to provide reasonable assurance about whether an entity's financial statements are presented fairly in accordance with generally accepted accounting principles.</p>
<p>84110000-ITQ-49 Auditing Services - Performance Audits (Internal Control / Audit Services)</p>	<p>Performance audits as an objective and systematic examination of evidence for the purpose of providing an independent assessment of the performance of a government organization, program, activity, or function, in order to provide information to improve public accountability and facilitate decision-making by parties with responsibility to oversee or initiate corrective action.</p>
<p>84110000-ITQ-48 Auditing Services - Operational and Claims Audits</p>	<p>These audits primary purpose is to check or assess the efficiency or effectiveness of a company's business operations, or evaluate monetary adjustments or claims submitted under disputed claims or other basis, may include, but are not limited to, work performed on a time and material basis, terminated contracts, and costs related to delayed claims.</p>
<p>84110000-ITQ-45 Auditing Services - Compliance Audits</p>	<p>During compliance audits, independent auditors assess the degree to which an operation conforms to legal obligations and agreements with outside parties. Included in this category are reviews of federal contracts and grants as well as audits of trusts in the endowment fund. Also included in compliance auditing is assessing the degree to which a component adheres to applicable federal and state policies and procedures.</p>
<p>80100000-ITQ-50 Contractor Workforce Analysis Service</p>	<p>Contractor Workforce Analysis Services includes, but is not limited to: consulting services related to the planning or analyzing of human capital needs and requirements for various construction and improvement projects. The Consultant must be able to analyze, evaluate and determine whether Transportation and Public Works construction projects should contain contractor workforce requirements to ensure a reliable and secure supply of properly skilled labor is available to ensure successful and timely project delivery. The Consultant must provide detailed reports as needed to assist in the evaluation of specific Transportation and Public Works projects for appropriate contractor workforce requirements, including the use of apprenticeship programs and craft labor quality assurance agreements. The Consultant must be able to analyze the economic conditions within a local construction industry, prevailing trends in the labor environment and pertinent collective bargaining agreements.</p>
<p>84110000-ITQ-52 Educational Consulting Services – Business/Finance Area 1</p>	<p>Services required include providing technical assistance to local education agencies (public school districts, charter schools, career and technical centers, intermediate units) in the areas of business and finance, including, but not limited to: internal controls, budget preparation, and implementation of best practices. Contractors will work under the direction of PA Department of Education leadership. School finance administrative experience required.</p> <p>Contractor must have the professional expertise related to PA school business administration, PA school board leadership, PA school auditing, and/or PA Local government fiscal recovery and budgeting; have extensive knowledge of the</p>

	<p>Pennsylvania School Code; and be free from conflicts of interest, criminal records related to services provided.</p>
<p>84110000-ITQ-51 Educational Consulting Services – Business/Finance Area 2</p>	<p>Services required include providing technical assistance to local education agencies (public school districts, charter schools, career and technical centers, intermediate units) in the areas of business and finance, including, but not limited to: internal controls, budget preparation, and implementation of best practices. Contractors will work under the direction of PA Department of Education leadership. School finance administrative experience required.</p> <p>Contractor must have the professional experience working with PA local education agencies, PA school professional organizations, PA Department of Education, and related state government agencies in Pennsylvania, including extensive knowledge of the Pennsylvania School Code; experience in managing multi-faceted team that can cover the many disparate elements of school finance – educational services, workforce costs, transportation, maintenance, food service, capital, security and others; experience in work with local multi-stakeholder coalitions and national and regional educational organizations; applicants must have advanced degree(s) in business leadership and/or professional certifications; and be free from conflicts of interest, criminal records related to services provided. Firms must detail any oversight by federal/state regulatory authorities, and/or personally or professionally bonded and insured.</p>
<p>84110000-ITQ-53 Educational Consulting Services- Student Achievement</p>	<p>Services required include providing project-based research and analytics to the PA Department of Education to support initiatives designed to directly or indirectly impact student achievement. The work involves project-based qualitative and quantitative educational research which supports PDE, IUs, school districts, CTCs, charter schools, postsecondary institutions, and/or early childhood centers; monitoring and/or evaluating program implementation at the aforementioned entities; and other responsibilities associated with improving the quality of educators and students and the institutions in which they work and study. Skill set and quantity of hours will vary based on project needs.</p>
<p>84110000-ITQ-54 Financial Services - Financial</p>	<p>Commonwealth Agencies have identified the need for professional Financial suppliers with the education and expertise to provide consulting services, but not be limited to:</p> <ul style="list-style-type: none"> • Public Finance; • Insurance; • Stock/Bonds; • Credit collection; • Debt Consolidation; • Trade; • Loans/Financing; • Financial Planning; • Investment; • Money Market;

	<ul style="list-style-type: none"> • Banking; • Custody Services; • Insurance Brokerage; • Insurance underwriting; and • Venture Capital
84110000-ITQ-55 Financial Services - Tax Credit Brokerage & Sales DGS CERTIFIED SMALL BUSINESS ONLY	Commonwealth agencies have identified the need for professional Financial Suppliers with the education and expertise to provide services related to the sale, brokerage or auctioning of Commonwealth Tax Credits.
84110000-ITQ-56 Government Relations	Subject matter services require proficiency, knowledge and experience in the field of Government Relations. Services shall be relative to federal actions, including but not limited to, analyses of the effects of legislation, regulatory impacts and the representation of State and Local Governments and Agencies on Federal matters which encompass, but are not limited to, strategic development and implementation, outreach and best practices in the interest of the State or Local Government.
85000000-ITQ-57 Healthcare Services - General	The Commonwealth has a need for assistance in planning, developing and operation or other facets of Healthcare and Public Health related initiatives. The initiatives may be completed in phases or as one project. Initiatives may be funded by grants, state or federal funds. Needs may be to cover research, consultation, assist w/legislative or regulatory review or actions, review plans, provide a plan, operation of a plan, public health program evaluation, public health program implementation, health related programming and knowledge of Health IT systems, assessment administration in the areas of support needs, level of care, problematic sexual behavior, dual diagnosis, or appropriateness of placement or any requested need that may arise. Consultants shall have working knowledge and expertise in the area of the request, whether it be health insurance expertise in rates and pricing, product distribution, knowledge and expertise in a specific healthcare plan/ field, or state/government program. Consultants should be able to provide analysis, modeling, consulting and be capable of coordinating and conducting implementation, transition and operational efforts, or any combination or additional service that is required.
85100000-ITQ-58 Healthcare Services- Innovation Strategies	The Commonwealth agencies have identified a need for technical consulting services to assist in the implementation of the Chronic Care Model through initiatives throughout the Commonwealth. Initiatives may include primary care medical practices that commit to implementing the Chronic Care Model to improve the quality of care for a designated chronic condition. Initiatives may include partnerships with private and public insurers who agree to provide financial incentives for demonstrated quality improvements based on process and outcomes data. Technical consulting is needed to assist in the planning and coordination of all activities of the initiatives, including curriculum development for training in the Chronic Care Model; instruction for medical practices in delivery system redesign, disease management, patient registry management; financial model design; and quality improvement monitoring. Technical consulting is also needed for developing

	policy recommendations and strategic planning for the ongoing implementation of the Chronic Care Model in the Commonwealth.
84110000-ITQ-59 Investigative Audits, Academic Audits	Internal Audit undertakes investigative audits when circumstances or evidence suggest a fiscal irregularity involving government funds, property, or personnel.
80100000-ITQ-60 Management - Business Case Development and Modeling	The Commonwealth has a need for the development of business cases, which management will rely upon in determining whether to approve and how to prioritize projects. Qualified providers may be called upon to develop cost/benefit analyses and/or to forecast return-on-investment. Qualified providers may be asked to provide additional detail on a preferred alternative, for instance, by developing a rough project plan, or inventorying areas of potential risk.
80100000-ITQ-62 Management General Government Operations - Best Practice Analysis	The Commonwealth has a need for assistance analyzing and comparing the ways various organizations manage projects and /or practices relating to a specific field or issue, in an attempt to identify leading approaches that would be suitable for introduction in Pennsylvania State Government. Reviews may compare multiple state agencies with each other, or with other states, the federal government, non-profits and institutions of higher education, and /or For-Profit enterprises.
80100000-ITQ-63 Management General Government Operations - Data Mining	The Commonwealth has a need for expert quantitative analysis and reporting. State agencies have access to enormous quantities of information through various states, federal, and local sources, which could be leveraged in order to improve service delivery, reduce costs, or yield other beneficial outcomes. The work may include the design and construction of queries spanning a broad range of systems and applications or may be limited to the analysis of information contained within existing sources and datasets. Qualified providers may be called upon to present their findings in a variety of written, oral, or electronic formats.
80100000-ITQ-65 Management General Government Operations - Operations Analysis	<p>The Commonwealth has a need for expertise in a variety of operational fields, including but not limited to:</p> <ul style="list-style-type: none"> • Lease management. • Space planning. • Supply chain and inventory practices. • Vehicle management. • Travel policy. • Print/mail operations. • Telecommunications deployment. • Disaster preparedness. • Workflow design; and • Risk and insurance management <p>Qualified providers may be asked to provide individual state agencies or the entire enterprise with recommendations on streamlining operations to realize efficiencies and/or improve customer service and organization development, develop feasibility</p>

	studies or business analysis and assessment services.
80100000-ITQ-66 Management General Government Operations - Program Evaluation and Benchmarking	The Commonwealth has a need for comprehensive assessments of the effectiveness of specific programs. These assessments are intended to determine what the qualitative and quantitative costs and benefits are for these programs and possibly compare these findings to alternate program structures (including those present or proposed in other states), scaled-back approaches, or the outright elimination of a program. The assessments may include surveys and reporting of analysis.
80100000-ITQ-64 Management General Government Operations - Measuring Process Performance/Improvement Outcomes	The Commonwealth has a need for assistance documenting existing processes, identifying redundancies, inefficiencies, and other opportunities for improvement, and developing and executing actionable implementation plans. Qualified providers may be requested to carry out some or all of these steps on processes that range from the administrative and financial to the operational or programmatic. Processes to be reviewed will vary widely in their level of technical complexity.
80400000-ITQ-61 Management General Government Operations- Safety and Health Services	The Commonwealth has a need for assistance with safety and health programs. Qualified providers may be requested to recommend strategic approaches for managing programs not limited to; safety and reducing risks of work related accidents; develop safety and health programs; perform hazard analysis; perform industrial hygiene services; manage day-to-day safety operations; develop and provide safety and health related training; or monitor and evaluate trends using agency data.
80100000-ITQ-67 Management General Government Operations - Strategic Planning	The Commonwealth has a need for assistance in determining and identifying where an organization is currently strategically standing, and where it should be strategically positioned over a over a short-term and long-term period. Qualified suppliers should be able to identify goals that originate from the current position of an organization, and plan accordingly to meet these visions. They may be requested to document an implementation plan which not only highlights a timeline of steps, but highlights positive and negative short-term outputs and longer-term outcomes. Consideration of an organization's environment and realistic capabilities will need to be understood, which ultimately will lead to priority based resourcing.
84140000-ITQ-72 Public Safety Services- Emergency Management All- Phases data collection and analysis, writing, and strategic planning	The Commonwealth has a need for assistance in the development and implementation of plans and strategies that encompass all phases of emergency management. <ul style="list-style-type: none"> • Knowledge of Response, Recovery, Preparedness, and Mitigation activities and processes and how they interrelate with each other; • Knowledge of the National Preparedness Goal and 5 Mission Areas; • Knowledge of the National Incident Management System (NIMS); and • Knowledge of natural hazards, technological hazards, and human caused-threats

<p>85110000-ITQ-71 Public Safety Services - Emergency Preparedness Exercises</p>	<p>The Commonwealth has a need for assistance for expertise in utilizing the Homeland Security Exercise and Evaluation Programs. Expertise in public health preparedness exercises:</p> <ul style="list-style-type: none"> • Design. • Development. • Delivery; and • Evaluation. <p>Expertise in After Action Report completion, in-depth understanding of the National Incident Management System and knowledge of the National Health Security Strategy, Target Capability List, and National Security.</p>
<p>84140000-ITQ-70 Public Safety Services - Emergency Preparedness Writer</p>	<p>The Commonwealth has a need for assistance for expertise in project management, in the development and implementation of emergency operations plans, including but not limited to:</p> <ul style="list-style-type: none"> • Influenza or other pandemic operations plans; • Expertise in public health emergency preparedness planning; and • Hazard planning <p>Knowledge of National Incident Management System. Knowledge of National health Security Strategy, Target Capabilities List and National Security Strategy.</p>
<p>86140000-ITQ-68 Public Safety Services - Emergency Preparedness Logistics</p>	<p>The Commonwealth has a need for expertise in distribution and transportation logistics, not limited to planning, designing, and implementing operating systems for moving goods or personnel.</p> <p>Expertise in supply chain management:</p> <ul style="list-style-type: none"> • Planning, acquisition, and management of logistic systems; • Training on logistic systems; and • Field management of systems. <p>Expertise in emergency deployment logistics:</p> <ul style="list-style-type: none"> • Contingency planning; • Public/private partnerships; • Rapid movement of essential items/personnel; and • Inventory Management.
<p>86100000-ITQ-69 Public Safety Services - Emergency Preparedness Training</p>	<p>Expertise in public health emergency preparedness planning and in adult learning theory and adult educational design.</p> <p>Expertise in training programs:</p> <ul style="list-style-type: none"> • Design • Planning • Delivery • Evaluation

	Knowledge of the National Incident Management System, National Health Security Strategy, Target Capabilities List, and National Security Strategy.
80110000-ITQ-73 Real Estate Planning Services	Real Estate Planning Services includes, but is not limited to, real estate consulting services in accordance with the acquisition and/or disposition of real property for the Commonwealth. The real estate planner must be able to provide guidance throughout all phases of the real estate transaction process, which may include, but is not limited to, property appraisals, environmental site assessments, zoning and planning, financial analysis and the disposition process. The Real Estate Planner must provide detailed reports as needed to assist in the acquisition/and or disposition process. The Real Estate Planner may be asked to provide additional consulting services as it relates to the acquisition/and or disposition of real property for the Commonwealth
84110000-ITQ-74 Technical Assistance - Post-Issuance Compliance Management	The Commonwealth has identified a need for technical assistance in the management of post-issuance compliance with IRS tax code regulations for tax-advantaged bonds issued by a statewide issuer of conduit and non-conduit economic development bonds.
84110000-ITQ-75 Technical Assistance- Federal Grant or Loan Programs	The Commonwealth has a need for Federal program administrators to provide technical assistance in connection with the implementation or administration of Federal grant or loan programs. Contractor should have a working knowledge and understanding of federal regulations, including, but not limited to: Environmental Requirements; Federal Labor Standards; Uniform Administrative Requirements; Uniform Relocation Act; and Financial Management Systems.
84110000-ITQ-76 Technical Assistance- State Grant or Loan Programs	The Commonwealth has a need for State program administrators to provide technical assistance in connection with the implementation or administration of State grant or loan programs. Contractor should have a working knowledge and understanding of state regulations and guidelines related to state grant and loan programs.
93414805-ITQ-237 Unemployment Compensation Cost Control Services	Commonwealth Agencies have identified the need for professional unemployment compensation cost control firms with the knowledge, education and expertise in Pennsylvania unemployment compensation law to provide these or similar services: <ul style="list-style-type: none"> • Process and respond to claims • File protests and appeals of improper claims decisions • Represent the agency at all hearings and appeals • Prepare witnesses • Review charges and credits for accuracy • File protests of erroneous charges

	<ul style="list-style-type: none"> • Conduct training • Provide reports
8010000-ITQ-315 Business Administration Campaign Finance	The responsibilities and the areas of expertise of the Contractor shall be the collection, filing, data entry, and reporting of Campaign Finance Expense Reports. The Supplier must have the ability to interface and upload with the Commonwealth database within the time sensitive window indicated by the Department
84110000-ITQ-319 Commercial Building Energy Audits DGS CERTIFIED SMALL BUSINESS ONLY	<p>Purpose: Perform commercial building energy audits; Audit Levels 1, 2, following ANSI/ASHRAE/ACCA/Standard 211-2018</p> <p>Qualified energy auditor: an energy solutions professional who assesses building systems and site conditions; analyzes and evaluates equipment and energy use; and recommends strategies to optimize building resource use.</p> <p>Experience must include completion of five commercial (nonresidential) building energy audits within the past three years or a cumulative completion of ten or more commercial building energy audits.</p> <p>The auditor must provide the most current certification and/or licenser of the following:</p> <ol style="list-style-type: none"> ASHRAE, Certified Building Energy Assessment Professionals (<u>BEAP</u>) Association of Energy Engineers, Certified Energy Auditors (<u>CEA</u>) Association of Energy Engineers, Certified Energy Manager (<u>CEM</u>) Energy Management Association, Energy Management Professional (<u>EMP</u>) Certification A licensed professional engineer
80110000-ITQ-320 ENERGY STAR Building Certifications DGS CERTIFIED SMALL BUSINESS ONLY	<p>Licensed Professional: a professional engineer or architect that verifies all energy use is accounted for accurately, building characteristics are properly reported, and indoor environmental quality has not been compromised in pursuit of energy conservation.</p> <p>The Licensed Professional must provide their most current license and meet all the following requirements:</p> <ul style="list-style-type: none"> • Have a full-time Professional Engineer or Registered Architect licensed to practice in Pennsylvania. • Have working knowledge of building systems and the most current version of ASHRAE Standard 55, ASHRAE Standard 62, and the IESNA Lighting Handbook; and • Understand all applicable Pennsylvania engineering and architecture licensure laws, professional ethics requirements, and regulations prior to offering or performing services.
84110000-ITQ-361 Accounting Services – General DGS CERTIFIED SMALL BUSINESS ONLY	Provide General Accounting Services

84110000-ITQ-362 Accounting Services - Decision analytics and predictive modeling DGS CERTIFIED SMALL BUSINESS ONLY	Conduct general analytics for economics, statistics, finance and accounting services
84110000-ITQ-363 Accounting Services- Fraud Detection and Identity Validation Services -claims, returns, and applications made to increase Commonwealth payments or decrease liabilities to the Commonwealth DGS CERTIFIED SMALL BUSINESS ONLY	Conducts analysis and proposes solutions relative to fraud and identify theft related tax programs and filers.
84110000-ITQ-364 Accounting Services - Cost Accounting DGS CERTIFIED SMALL BUSINESS ONLY	Conducts accounting services related to cost structure and effectiveness.
84160000-ITQ-365 Actuarial Services - Actuarial Consultant Pensions/Investment Area 1 DGS CERTIFIED SMALL BUSINESS ONLY	AREA 1 Provide Actuarial Services
84100000-ITQ-366 Actuarial Services – Actuarial Consultant Financial Area 1 DGS CERTIFIED SMALL BUSINESS ONLY	AREA 1 Provide Actuarial Services
84130000-ITQ-367 Actuarial Services - Actuarial Consultant Healthcare/Medical Area 1 DGS CERTIFIED SMALL BUSINESS ONLY	AREA 1 Provide a minimum professional experience in the actuarial consultant field; guidance on the requirements evolving from federal legislation impacting commonwealth programs.
84130000-ITQ-368 Actuarial Services - Actuarial Consultant Healthcare/Medical	AREA 2 Provide a minimum professional experience in the actuarial consultant field;

Area 2 DGS CERTIFIED SMALL BUSINESS ONLY	guidance on the requirements evolving from federal legislation impacting commonwealth programs.
84110000-ITQ-369 Arts (non-profit) DGS CERTIFIED SMALL BUSINESS ONLY	Provide technical and administrative services to non-profit Arts related services.
84110000-ITQ-370 Auditing Services – General DGS CERTIFIED SMALL BUSINESS ONLY	Provide general Auditing services.
84110000-ITQ-371 Auditing Services - Financial and Financial Related Audit Services DGS CERTIFIED SMALL BUSINESS ONLY	Conduct financial audits in accordance with general accounting principles.
84110000-ITQ-372 Auditing Services - Performance Audits (Internal Control / Audit Services) DGS CERTIFIED SMALL BUSINESS ONLY	Conduct Performance audits as an objective and systematic examination of evidence for the purpose of providing an independent assessment of the performance of a government organization, program, activity, or function.
84110000-ITQ-373 Auditing Services - Operational and Claims Audits DGS CERTIFIED SMALL BUSINESS ONLY	Assess the efficiency or effectiveness of a company's business operations, or evaluate monetary adjustments or claims submitted under disputed claims.
84110000-ITQ-374 Auditing Services - Compliance Audits DGS CERTIFIED SMALL BUSINESS ONLY	Conduct and assess the degree to which an operation conforms to legal obligations and agreements with outside parties.
80100000-ITQ-375 Contractor Workforce Analysis Service DGS CERTIFIED SMALL BUSINESS ONLY	Services are related to the planning or analyzing of human capital needs and requirements for various construction and improvement projects.
84110000-ITQ-376 Educational Consulting Services – Business/Finance Area 1 DGS CERTIFIED SMALL BUSINESS ONLY	AREA 1 Services are to provide technical assistance to local education agencies (public school districts, charter schools, career and technical centers, intermediate units) in the areas of business and finance.
84110000-ITQ-377 Educational Consulting Services – Business/Finance Area 2 DGS CERTIFIED SMALL BUSINESS ONLY	AREA 2 Services are to provide technical assistance to local education agencies (public school districts, charter schools, career and technical centers, intermediate units) in the areas

BUSINESS ONLY	of business and finance.
84110000-ITQ-378 Educational Consulting Services- Student Achievement DGS CERTIFIED SMALL BUSINESS ONLY	Services are to support initiatives designed to directly or indirectly impact student achievement.
84110000-ITQ-379 Financial Services – Financial DGS CERTIFIED SMALL BUSINESS ONLY	Provide Consulting relative to financial services.
84110000-ITQ-380 Government Relations DGS CERTIFIED SMALL BUSINESS ONLY	Conduct services proficient in the field of Government Relations.
85000000-ITQ-381 Healthcare Services – General DGS CERTIFIED SMALL BUSINESS ONLY	Assist in planning, developing and operation or other facets of Healthcare and Public Health related initiatives.
85100000-ITQ-382 Healthcare Services- Innovation Strategies DGS CERTIFIED SMALL BUSINESS ONLY	Provide technical consulting services to assist in the implementation of the Chronic Care Model through initiatives throughout the Commonwealth.
84110000-ITQ-383 Investigative Audits, Academic Audits DGS CERTIFIED SMALL BUSINESS ONLY	Provide investigative audits relative to fiscal irregularity.
80100000-ITQ-384 Management - Business Case Development and Modeling DGS CERTIFIED SMALL BUSINESS ONLY	Provide and develop business cases to for improvement and prioritization of projects.
80100000-ITQ-385 Management General Government Operations - Best Practice Analysis DGS CERTIFIED SMALL BUSINESS ONLY	Conduct and provide services to better manage projects.
80100000-ITQ-386 Management General Government Operations - Data Mining DGS CERTIFIED SMALL BUSINESS ONLY	Conduct and provide services relative to quantitative analysis and reporting.
80100000-ITQ-387 Management General Government Operations -	Assistance in Governmental operational fields.

Operations Analysis DGS CERTIFIED SMALL BUSINESS ONLY	
80100000-ITQ-388 Management General Government Operations - Program Evaluation and Benchmarking DGS CERTIFIED SMALL BUSINESS ONLY	Conduct comprehensive assessments of projects/programs.
80100000-ITQ-389 Management General Government Operations - Measuring Process Performance/Improvement Outcomes DGS CERTIFIED SMALL BUSINESS ONLY	Assist in the documenting of existing processes, identifying redundancies, inefficiencies, and other opportunities for improvement, and developing and executing actionable implementation plans.
80400000-ITQ-390 Management General Government Operations- Safety and Health Services DGS CERTIFIED SMALL BUSINESS ONLY	Assistance with safety and health programs.
80100000-ITQ-391 Management General Government Operations - Strategic Planning DGS CERTIFIED SMALL BUSINESS ONLY	Assistance in determining and identifying where an organization is currently strategically standing, and where it should be strategically positioned over a over a short-term and long-term period.
84140000-ITQ-392 Public Safety Services- Emergency Management All- Phases data collection and analysis, writing, and strategic planning DGS CERTIFIED SMALL BUSINESS ONLY	Assistance in the development and implementation of plans and strategies that encompass all phases of emergency management.
85110000-ITQ-393 Public Safety Services - Emergency Preparedness Exercises DGS CERTIFIED SMALL BUSINESS ONLY	Assistance in utilizing the Homeland Security Exercise and Evaluation Programs.
84140000-ITQ-394 Public Safety Services -	Provide expertise and administrative services in project management relative to the development and implementation of emergency operations plans

Emergency Preparedness Writer DGS CERTIFIED SMALL BUSINESS ONLY	
86140000-ITQ-395 Public Safety Services - Emergency Preparedness Logistics DGS CERTIFIED SMALL BUSINESS ONLY	Provide expertise and administrative services relative to distribution and transportation logistics for moving goods and/or personnel.
86100000-ITQ-396 Public Safety Services - Emergency Preparedness Training DGS CERTIFIED SMALL BUSINESS ONLY	Provide expertise and administrative services in public health emergency preparedness planning.
80110000-ITQ-397 Real Estate Planning Services DGS CERTIFIED SMALL BUSINESS ONLY	Provide real estate consulting services in accordance with the acquisition and/or disposition of real property for the Commonwealth.
84110000-ITQ-398 Technical Assistance- Federal Grant or Loan Programs DGS CERTIFIED SMALL BUSINESS ONLY	Provide assistance in the administration of federal grant and/or loan programs and all related services.
84110000-ITQ-399 Technical Assistance- State Grant or Loan Programs DGS CERTIFIED SMALL BUSINESS ONLY	Provide assistance in the administration of state grant and/or loan programs and all related services.
93414805-ITQ-400 Unemployment Compensation Cost Control Services DGS CERTIFIED SMALL BUSINESS ONLY	Conduct Unemployment Compensation cost control and related services
80100000-ITQ-480 Human Resources Consulting Service	<p>The purpose of this Recruitment Services ITQ is to qualify responsible and knowledgeable contractors to perform consulting services to Commonwealth of Pennsylvania's executive agencies to conduct executive searches to recruit government personnel.</p> <p>Expectations are:</p> <ul style="list-style-type: none"> • Expertise in relevant industry • Well-defined executive search strategy • Commitment to transparency in talent search process • Established selection and interview methods

56000000-ITQ-567 Interior Design Services

Commonwealth using agencies-

This category is strictly limited to **furniture layout design services only** in anticipation of a Commonwealth agency furniture purchase. It is NOT intended for repairs, alterations, or improvements to Commonwealth buildings. Please see [Management Directive 625.1](#) relating to such projects. Agencies wishing to conduct projects as outlined in 625.1 must consult with DGS Capitol Programs and Bureau of Real Estate.

Potential Suppliers-

The purpose of Interior Design Services is to qualify responsible and knowledgeable contractors to provide interior space planning and furniture design services to ensure functional, aesthetic, and code-compliant environments aligned with the end-user's operational needs. Qualified vendors must be able to provide office design services from CAD drawings which will become property of the Commonwealth and will be used in Commonwealth solicitation packages.

Vendors may not share vital information related to the Commonwealth or shared by Commonwealth in the course of responding to or performing a scope of work as part of this commodity code.

Due to the Pennsylvania Adverse Interest Act, the supplier who provides drawings to the Commonwealth may not participate in any solicitation packages that utilize the supplier-created designs.

Key Deliverables:

- Bid Package Preparation: Prepare drawings, specifications, and documentation required for procurement or construction coordination.
- Needs Assessment: Conduct interviews or surveys with stakeholders to determine functional requirements.
- Space Planning: Develop scaled floor plans showing optimal furniture layout, circulation, and code compliance (e.g., ADA, fire egress).
- Furniture Specifications: Identify and document furniture types, interior space planning, dimensions, finishes, fabrics, and performance standards.
- Finish Boards & Renderings: Provide visual presentations of proposed furniture, including workstation typicals and finishes.
- Product Schedules: Create detailed furniture schedules including quantities, suggested manufacturer, model numbers, and pricing.
- Agency workspace redesigns and space optimization initiatives. Support for lease projects, renovations, and reconfigurations.

80100000-ITQ-568 Physical Security Assessment Audit

A physical security assessment in Pennsylvania constitutes a structured, standards-based evaluation of an organization's facilities, personnel safeguards, and critical infrastructure. The process applies recognized risk assessment frameworks to identify exposure points and quantify vulnerabilities across physical domains.

All assessments must be conducted or overseen by an **ASIS International Certified Protection Professional (CPP)** or equivalent credentialed security practitioner. This ensures that findings and recommendations are guided by globally recognized best practices, ethical standards, and professional expertise.

Deliverables include a **comprehensive risk report** with prioritized findings, gap analysis, and tailored mitigation strategies. Recommendations are designed to enhance resilience, reduce exposure to tangible threats, and strengthen the organization's overall security posture through layered defense principles.

Key Components of the Physical Security Assessment

1. Facility Overview & Risk Context

- Facility Name and Address
- Facility Function (e.g., administrative, public-facing, secure records)
- Facility Security Level (FSL) Determination
- Assessment Team Members (including ASIS CPP-certified lead)
- Date of Assessment
- Known Threats (e.g., crime, protest activity, insider risk)

2. Perimeter & Access Control

- Perimeter fencing or natural barriers are intact and maintained
- Vehicle access points controlled (gates, bollards, barriers)
- Pedestrian access points monitored and limited
- Exterior lighting adequate for entry points and parking areas
- Surveillance cameras cover critical exterior areas and are actively monitored.
- Signage clear, compliant, and visible
- Landscaping adheres to CPTED principles (no concealment zones)

3. Building Envelope

- Exterior doors reinforced and access-controlled
- Windows shatter-resistant or protected with film/screens
- Roof access restricted and monitored
- Loading docks and delivery areas secured
- Mailroom isolated with screening protocols in place

	<p>4. Interior Controls</p> <ul style="list-style-type: none"> • Access control systems (badges, PINs, biometrics) operational • Visitor management system with sign-in and escort policy • Surveillance cameras cover critical areas and are actively monitored • Intrusion detection systems (alarms, motion sensors) functional • Emergency exits alarmed and unobstructed • Secure storage for sensitive documents and equipment <p>5. Critical Infrastructure Protection</p> <ul style="list-style-type: none"> • HVAC and air intakes secured and elevated • Electrical and telecom rooms locked and access-controlled • Server/data rooms climate-controlled and monitored • Backup power systems (generators, UPS) tested regularly • Water shutoff and fire suppression systems are accessible and functional <p>6. Emergency Preparedness</p> <ul style="list-style-type: none"> • Evacuation plans posted and updated • Shelter-in-place areas designated and stocked • Fire and lockdown drills conducted regularly • First responders provided floor plans and contact information • Emergency communication systems (PA, alerts) tested and reliable <p>7. Personnel & Policy</p> <ul style="list-style-type: none"> • Security personnel trained, certified, and supervised by ASIS CPP professional • Background checks conducted for all staff and contractors • Insider threat awareness training provided • Physical security policy documented, enforced, and reviewed • Staff receive ongoing security awareness training <p>8. Documentation & Continuous Improvement</p> <ul style="list-style-type: none"> • Risk register maintained and updated • Mitigation plan developed with timelines and responsibilities • Security incidents logged, reviewed, and analyzed for trends • Assessment findings documented and shared with leadership • Reassessment scheduled annually or after major operational changes
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84100000-ITQ-587 Actuarial Services – Property & Casualty Insurance Ratemaking	<p>Suppliers must be familiar with standard and typical insurance policies, coverages, rate and rule manuals, classification plans, and ratemaking principles and procedures for property and casualty insurance coverages such as auto, home, pet, workers compensation, medical professional liability, general liability, business owners, and umbrella/excess.</p> <p>Note: Contractor must provide proof they are a member of the Americal Academy of Actuaries or the Society of Actuaries.</p>
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REQUEST FOR QUOTES (RFQ) PROCEDURES: Commonwealth Agencies will issue an RFQ to qualified Contractors, through the Commonwealth’s Custom Portal, powered by the JAGGAER system. Contractors will respond to the RFQ in the system. The requesting Agencies may require the qualified Contractors to furnish, upon request, additional documentation in the RFQ. The qualified Contractors selected for the RFQ process will receive a Purchase Order (PO) and will supply the service to meet the specific requirements as indicated in the RFQ.

Agencies will exercise a scoring method based upon the criteria set forth in the RFQ. The Scoring Methods are defined as follows:

- Best Value
 - Refers to the process of selecting the quote which provides the greatest value to the agency based on evaluating and comparing all pertinent criteria, including cost, so that the Contractor whose overall proposal best suits the agency’s needs is selected for each individual project; and
- Low Cost
 - Refers to the lowest cost quoted from all proposals received that are deemed both responsive and responsible for the project.