

JLR Manager (Initial)



Notice of Intent to Award

Solicitation Number	GG000062	Award Date	6/11/2026 10:04 AM CDT
Solicitation Title	Actuarial Services		
Buyer Name	Grace Wichert	Buyer Email	Grace.Wichert@nashville.gov
BAO Rep	N/A	BAO Email	N/A

Awarded Supplier(s)

In reference to the above solicitation and contingent upon successful contract negotiation, it is the intent of the Metropolitan Government of Nashville and Davidson County to award to the following supplier(s):

Company Name (1)	USI Consulting Group, Inc.
Company Name (2)	
Company Name (3)	
Company Name (4)	
Company Name (5)	
Company Name (6)	

Certificate of Insurance

The awarded supplier(s) must submit a certificate of insurance (COI) indicating all applicable coverage required by the referenced solicitation. The COI should be emailed to the referenced buyer no more than 15 days after the referenced award date.

Equal Business Opportunity Program

Where applicable, the awarded supplier(s) must submit a signed copy of the letter of intent to perform for any and all minority-owned (MBE) or woman-owned (WBE) subcontractors included in the solicitation response. The letter(s) should be emailed to the referenced business assistance office (BAO) rep no more than two business days after the referenced award date.

☐ Yes, the EBO Program is applicable.

☒ No, the EBO Program is not applicable.

Monthly Reporting

Where applicable, the awarded supplier(s) will be required monthly to submit evidence of participation and payment to all small (SBE), minority-owned (MBE), women-owned (WBE), LGBT-owned (LGBTBE), and service-disabled veteran owned (SDV) subcontractors. Sufficient evidence may include, but is not necessarily limited to copies of subcontracts, purchase orders, applications for payment, invoices, and cancelled checks.

Questions related to contract compliance may be directed to the referenced BAO rep.

☐ Yes, monthly reporting is applicable.

☒ No, monthly reporting is not applicable.

Public Information and Records Retention

Solicitation and award documentation are available upon request. Please email the referenced buyer to arrange. A copy of this notice will be placed in the solicitation file and sent to all offerors.

Right to Protest

Per MCL 4.36.010 – any actual or prospective bidder, offeror, or contractor who is aggrieved in connection with the solicitation or award of a contract may protest to the purchasing agent. The protest shall be submitted in writing within ten (10) days after such aggrieved person knows or should have known of the facts giving rise thereto.

Michelle D. Hernandez Lane
Michelle Lane
Interim Purchasing Agent & Chief Procurement Officer

ZK (Initial)
Zak Kelley



GG000062 – Actuarial Services

Company Name	Business Plan (35 Points)	Firm Experience and Qualifications (15 Points)	Team Experience and Qualifications (20 Points)	Cost Criteria (30 Points)	Total Points (100 Max)
Segal Company (Eastern States)	20	12	17	19.70	68.70
USI Consulting Group, Inc.	35	15	18	30	98

RFQ GG000062 - Actuarial Services		Lowest Bid		Total Cost Points
		\$961,600.00		30.00
Offeror's Name	Bids	Evaluation Amount	Rank	RFP Cost Points
Segal Company (Eastern States)	\$1,464,000.00	\$1,464,000.00	2.00	19.70
USI Consulting Group, Inc.	\$961,600.00	\$961,600.00	1.00	30.00

Segal	
Strengths	Weaknesses
Extensive actuarial experience, including service to 800+ pension clients which is above expectations. Demonstrated experience in providing actuarial services to public sector and pension clients similar to Metro which met expectations. Team biographies demonstrated relevant qualifications and experience which met expectations. Experience working with Oracle pension calculation databases which met expectations. Maintains deferred vested member database which met expectations. Provided estimated timeline for completing valuations which met expectations. Provided a dedicated Client Relationship Manager to serve as POC and to coordinate services which met expectations.	Does not identify vested member database as the official source for determining benefits which is below expectations. Proposal notes contractor will review DROs and identify deficiencies but will not qualify QDRO. QDRO-related services are also considered supplemental and that may result in additional fees which is significantly below expectations. Proposed valuation timeline of 8-12 weeks from receipt of complete data to draft delivery is somewhat below expectations. Limited in-person meeting attendance. Proposal included 2 in-person meetings with additional in-person meetings subject to additional fees. Solicitation requirement required in-person attendance for all Board and committee meetings. This is significantly below expectations. No identifiable unique experience or qualification noted beyond the services offered which is below expectations. Information requested regarding client retention, turnover and length of client relationship was not clearly addressed which is below expectations. Communication is routed through Client Relationship Manager and does not address how direct communication with the lead actuaries would occur which is below expectations.

USI	
Strengths	Weaknesses
Extensive and detailed information regarding qualifications, experience and prior projects which is significantly above expectations. Detailed and thorough description for assumptions, reconciliations and peer review processes which are significantly above expectations. Support for complex pension calculations, including QDRO-related calculations and demonstrated experience supporting Metro’s QDRO review and qualification process which is significantly above expectations. Ability to maintain deferred vested database for determining future benefits which are significantly above expectations. Noted availability to directly participate in phone calls or meetings with participants, which is significantly above expectations. No exceptions or deviations noted which meets expectations. Team members demonstrated relevant experience and qualifications which met expectations. Ability to attend all in person meetings as needed, including last-minute meetings which is above expectations. Direct access to communicate directly with lead Actuaries which met expectations.	Provided the requested disclosure regarding litigation, however the description of the circumstances was limited which is somewhat below expectations. Stated pension client losses were mostly due to plan terminations but did not provide a breakdown of those losses which is somewhat below expectations. References provided for lead actuaries reflected smaller plans than Metro’s which is somewhat below expectations.

Provided detailed communication response timeline. Requests received prior to noon would receive acknowledgement same day; after noon, acknowledgement would be received no later than noon of the following business day which is above expectations.	
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Certificate Of Completion

Envelope Id: 8AACAAD5-9823-8E4A-8322-92010E68CAB8

Status: Completed

Subject: Intent to Award - RFQ # GG000062 for Actuarial Services

Source Envelope:

Document Pages: 3

Signatures: 1

Envelope Originator:

Certificate Pages: 2

Initials: 2

Grace Wichert

AutoNav: Enabled

730 2nd Ave. South 1st Floor

Envelopeld Stamping: Enabled

Nashville, TN 37219

Time Zone: (UTC-06:00) Central Time (US & Canada)

Grace.Wichert@nashville.gov

IP Address: 170.190.198.185

Record Tracking

Status: Original

Holder: Grace Wichert

Location: DocuSign

6/9/2026 12:38:48 PM

Grace.Wichert@nashville.gov

Security Appliance Status: Connected

Pool: StateLocal

Signer Events

Signature

Timestamp

Terri L. Ray

Sent: 6/9/2026 12:54:20 PM

Terri.Ray@nashville.gov

Viewed: 6/9/2026 12:56:11 PM

Finance Manager

Signed: 6/9/2026 12:56:29 PM

Metropolitan Government of Nashville and Davidson County

Signature Adoption: Pre-selected Style

Using IP Address: 170.190.198.185

Security Level: Email, Account Authentication (None)

Electronic Record and Signature Disclosure:

Not Offered via Docusign

Zak Kelley

Sent: 6/9/2026 12:56:30 PM

Zak.Kelley@Nashville.gov

Viewed: 6/9/2026 1:12:52 PM

Finance Manager

Signed: 6/9/2026 1:13:49 PM

Metro Nashville Government

Signature Adoption: Drawn on Device

Using IP Address:

2600:100b:b106:39e:e9ba:a161:e8fa:9d29

Signed using mobile

Security Level: Email, Account Authentication (None)

Electronic Record and Signature Disclosure:

Not Offered via Docusign

Michelle A. Hernandez Lane

Sent: 6/9/2026 1:13:50 PM

michelle.lane@nashville.gov

Viewed: 6/11/2026 10:04:30 AM

Deputy Director of Finance

Signed: 6/11/2026 10:04:47 AM

Metro

Signature Adoption: Pre-selected Style

Using IP Address: 174.212.165.20

Signed using mobile

Security Level: Email, Account Authentication (None)

Electronic Record and Signature Disclosure:

Not Offered via Docusign

In Person Signer Events

Signature

Timestamp

Editor Delivery Events

Status

Timestamp

Agent Delivery Events

Status

Timestamp

Intermediary Delivery Events

Status

Timestamp

Certified Delivery Events

Status

Timestamp

Carbon Copy Events	Status	Timestamp
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp
Envelope Summary Events	Status	Timestamps
Envelope Sent	Hashed/Encrypted	6/9/2026 12:54:20 PM
Certified Delivered	Security Checked	6/11/2026 10:04:30 AM
Signing Complete	Security Checked	6/11/2026 10:04:47 AM
Completed	Security Checked	6/11/2026 10:04:47 AM
Payment Events	Status	Timestamps