



West Virginia Purchasing Division

2019 Washington Street, East
Charleston, WV 25305
Telephone: 304-558-2306
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Bid Fax: 304-558-3970

The following documentation is an electronically-submitted vendor response to an advertised solicitation from the *West Virginia Purchasing Bulletin* within the Vendor Self-Service portal at ***wvOASIS.gov***. As part of the State of West Virginia's procurement process, and to maintain the transparency of the bid-opening process, this documentation submitted online is publicly posted by the West Virginia Purchasing Division at ***WVPurchasing.gov*** with any other vendor responses to this solicitation submitted to the Purchasing Division in hard copy format.

Header 1

[List View](#)

General Information

Contact

Default Values

Discount

Document Information

Procurement Folder: 279529

Procurement Type: Central Master Agreement

Vendor ID: 000000223967



Legal Name: LEWIS & ELLIS INC

Alias/DBA:

Total Bid: \$800,000.00

Response Date: 01/17/2017



Response Time: 15:55

SO Doc Code: CRFQ

SO Dept: 0704

SO Doc ID: INS1700000005

Published Date: 12/29/16

Close Date: 1/18/17

Close Time: 13:30

Status: Closed

Solicitation Description: Addendum No. 01 - Actuarial Rate & Review Life and Health

Total of Header Attachments: 1

Total of All Attachments: 1

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Actuarial consulting services	1000.00000	HOUR	\$200.000000	\$200,000.00

Comm Code	Manufacturer	Specification	Model #
80101512			

Extended Description : Actuarial Rate Review of Life and Health Filings Year 1

Comments: Please see Exhibit A for Pricing

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	Actuarial consulting services	1000.00000	HOUR	\$200.000000	\$200,000.00

Comm Code	Manufacturer	Specification	Model #
80101512			

Extended Description : Actuarial Rate Review of Life and Health Filings Year 2 Renewal 1

Comments: Please see Exhibit A for Pricing

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
3	Actuarial consulting services	1000.00000	HOUR	\$200.000000	\$200,000.00

Comm Code	Manufacturer	Specification	Model #
80101512			

Extended Description : Actuarial Rate Review of Life and Health Filings Year 3 Renewal 2

Comments: Please see Exhibit A for Pricing

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
4	Actuarial consulting services	1000.00000	HOUR	\$200.000000	\$200,000.00

Comm Code	Manufacturer	Specification	Model #
80101512			

Extended Description : Actuarial Rate Review of Life and Health Filings Year 4 Renewal 3

Comments: Please see Exhibit A for Pricing



PROPOSAL FOR ACTUARIAL SERVICES

PREPARED FOR THE STATE OF WEST VIRGINIA PURCHASING DIVISION

**ON BEHALF OF THE WEST VIRGINIA OFFICES OF THE INSURANCE
COMMISSIONER**

BY LEWIS & ELLIS, INC. ACTUARIES & CONSULTANTS

JANUARY 17, 2016

Prepared by
Kimberly Shores, FSA, MAAA, Vice President

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Section 1: Company Information

Organization: Lewis & Ellis, Inc.

Corporate Address: 700 Central Expressway South
Suite 550
Allen, TX 75013-8098

Type of Entity: Texas Corporation

Company Website: www.LewisEllis.com

Contact Person: Kim Shores
Telephone Number: 913-491-3388
Fax Number: 913-642-9777
Email: KShores@LewisEllis.com

a) Length of time in business

The firm was formed in 1968 in Dallas as Buchanan & Lewis, Inc. and has been in business for over 45 years. The firm opened an office in Kansas City (Overland Park) in 1970, and one in Los Angeles in 1973. The corporate name was changed to Lewis & Ellis, Inc. (L&E) in 1976. The Los Angeles office was relocated to Dallas in 1996 due to retirement of the managing partner there. A London branch was opened in 2007. A Baltimore, Maryland office was opened in the fall of 2010. We currently have additional branch offices in Denver and Indianapolis.

b) Sales Volume for last five years

Revenues for the last 5 years have increased from \$16 million to almost \$25 million per year.

c) Size and location of facilities servicing Contract

The office that will be servicing the Contract is located at:

11225 College Blvd., Suite 320
Overland Park, KS 66210

The Kansas City office has 32 employees of which 15 are Fellows of the Society of Actuaries (FSA) and 4 are Associates of the Society of Actuaries (ASA). The Company employs another 11 FSAs, 5 ASAs and 2 Fellows of the Casualty Actuarial Society (FCAS) in the other branch offices.

Section 2: Prior Experience

In the last 10 years L&E has reviewed over 750 non-health benefit plans, including long-term care insurance and disability income plans.

Lewis and Ellis has performed over 450 accident and sickness rate filing reviews for Arkansas, Arizona, California, D.C., Illinois, Iowa, Louisiana, Kentucky, Massachusetts, Michigan, Nebraska, Nevada, Vermont, and Virginia. These have included new rate filings as well as rate increase requests for various products including Medicare Supplement, Major Medical, Disability Income, Long Term Care, Hospital Confinement, Critical Illness, Cancer and Accident Only. These are ongoing engagements. We have been performing reviews since 2003 on a continuous basis.

Over the past 3 years, 109 rate reviews were performed for commercial major medical insurance. 59 of these reviews were for ACA individual and small group products. These reviews were done for the Iowa Insurance Division (IA ID), the Michigan Department of Insurance and Financial Services (DIFS), Nebraska Department of Insurance (NE DOI), Nevada Division of Insurance (NV DOI), and the Virginia Bureau of Insurance (VA BOI). Our involvement with the Michigan DIFS included the actual reviews of the filings, recommendations for improving some of the methods used by BCBSM, assisting DIFS with negotiating on the Group Conversions and Non-group filings, and assisting the Attorney General, especially on the Medicare Supplement filing. We were present for two hearings and provided expert testimony.

We performed research and provided an analysis of the competitiveness of the Michigan health insurance marketplace for DIFS, specific to a proposed acquisition by Blue Care Network in 2009. This project included developing, distributing and compiling two surveys – one for health insurance agents and health insurance carriers. We measured market share on both a statewide and regional basis within Michigan. We showed the change in market share if a proposed acquisition were to take place. We researched the Herfindahl-Hirschman Index and were able to provide measures for the several health insurance markets. We related these measures to other industries and determined that the HHI measure does not represent the health insurance industry well.

In addition, L&E has worked with other state agencies on special projects related to health rate review, including the Colorado Division of Insurance, the Kansas Insurance Department, and the Arizona Department of Insurance.

Lewis & Ellis is one of six contractors which perform Medicare Advantage and Medicare Prescription Drug Bid reviews for the Centers for Medicare & Medicaid Services (CMS). We review the basis and validity of assumptions included in individual company bidding processes and provide recommendations regarding approval of the bids. The reviews are performed annually from June through August. We have been performing these reviews since 2005.

Three (3) specific references have been provided in Appendix C.

Lewis & Ellis has no conflicts of interest with any carrier actively writing Health or Life products in West Virginia.

Section 3: Staffing

Kimberly Shores, FSA, MAAA is Vice President in the Kansas City office. She has nearly 20 years of experience primarily in accident and health insurance. At L&E, Kimberly is one of the lead rate reviewers for health products. Prior to rejoining L&E she was Director, Actuarial Services for Coventry Health Care in Kansas City. While at Coventry, a portion of her responsibilities included commercial group and individual medical (including major medical) pricing and rate adequacy. She also worked on provider contracting analysis, trend analysis and financial forecasting.

Chris Merkel, FSA, MAAA is Vice President and Principal in the Kansas City office. He has more than 20 years of insurance experience, specializing in managed health care. Chris' experience includes serving as an Appointed Actuary, Individual & Commercial group pricing, reserving, Medicare Advantage annual bid submission with CMS, M&A, provider contracting analysis, trend development, financial forecasting, experience studies, and rate filing submissions. Chris has hands-on experience assisting existing insurance companies expand into new states and territories, as well as providing solutions for start-up Consumer Operated and Oriented Plan (CO-OP) clients. Chris also has several years of experience with Life and Annuity products.

Karen Elsom, FSA, MAAA is a Consulting Actuary in the Kansas City office. She has nearly 30 years of life and accident and health experience, including product development, actuarial examinations for the Kansas Insurance Department, Michigan Department of Insurance and Financial Services, the Missouri Insurance Department, the Wisconsin Insurance Department and the Arizona Insurance Department since 1998 and A&H rate filings.

Jeffrey Lee, ASA, MAAA is Assistant Vice President in the Kansas City office. He has 26 years of Life, Reinsurance, Long Term Care and Disability experience. Jeff has held positions with insurance companies, reinsurance companies, and consulting firms. His areas of practice include life product development, reinsurance pricing, statutory valuation for life and health products, cash flow testing, and actuarial software conversions. He has provided rate reviews of LTC insurance.

Heather Robinson is a Senior Actuarial Associate in the Kansas City office with nearly 25 years of accident and health experience. Heather's experience includes individual and group product lines of Medicare supplement, Medicaid, major medical, dental and other limited health benefit plans. Heather has more than ten years of experience working for insurance carriers providing support in the areas of product development, rate filings, and Annual Statement preparation. Heather has prepared hundreds of rate filings for individual and group products encompassing more than 40 different state insurance departments with her primary focus on Medicare supplement and major medical product lines.

Remington Rotthause is an Actuarial Student in the Kansas City Office. He provides support for the health team on rate filings, rate reviews, product development and experience studies.

The actuarial associates will vary by review. However, all will have minimum qualifications of a college undergraduate degree and at least one examination administered by the Society of Actuaries. We do not plan to use any subcontractors for this project.

Section 4: Statement of Work and Project Planning

A sample work plan is illustrated below, based on our regular process for rate review. This process can be altered to fit West Virginia's ideal timeframe for rate review, and any other actuarial work as needed. As part of the process, L&E will work closely with the Offices of the Insurance Commissioner to determine a formalized timeline. L&E will remain flexible to adhere to West Virginia Offices of the Insurance Commissioner's requirements.

For staffing purposes, Jeff Lee will be the lead consultant on reviewing long term care rate filings. He will be supported by Heather Robinson.

We have several credentialed actuaries with experience in reviewing life and health rate filings. These are Chris Merkel, Kimberly Shores and Karen Elsom. The lead consultant on each review will be based on the availability of these consultants. They will be supported by Heather Robinson and Remington Rotthaus.

The described project encompasses the following activities:

- Review rate filings and opining on all actuarial soundness and the rate filing requirements set forth for group and individual rate submissions, as well as the rate for each product within those lines of business. This includes compliance with standards set forth in Actuarial Standard of Practice #8 on Regulatory Filings for Health.
- Perform a Completeness Determination within one (1) week of receipt.
- Provide an Actuarial Opinion of rates as filed and/or determination if amended (if applicable) within fifteen (15) days following the completeness determination.
- Provide the finalized, written actuarial report and opinion to the Offices of the Insurance Commissioner (OIC) no later than one (1) week after we receive approval to finalize the report and opinion. This report shall include a review of all components of the rate filing including justification and concerns surrounding these elements.
- Be available for questions and consultation during the term of the Contract, as may be necessary through the rate review process of these filings.
- Develop a manual of rate review guidelines for use by OIC staff. This manual will document essential steps of the rate review process and establish benchmarks for the various components of the rates by product line. This manual will serve not only as a checklist for OIC analysts, but also a training tool. L&E will work with OIC to review their current tool and develop a new one that serves the above-stated purpose. It is expected that this development will be a collaborative effort between L&E and the OIC.
- Any other Actuarial work as needed. L&E will remain flexible as workloads may require.

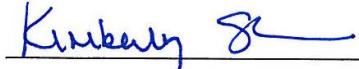
Section 5: Service Capabilities

L&E has the ability to generate reports as required by the state. These include, but are not limited to itemized reports of total items purchased by all agencies or individual agencies, open invoices, delivery compliance reports, quantity reports and service compliance reports.

Section 6: Pricing

Our Price Proposal is included as Appendix A using the provided pricing page. This proposal is consistent with our rate for work performed for other clients and in conjunction with our work for rate reviews for various states. The price quoted is firm for the length of the Contract Period beginning April 1, 2017 and ending March 31, 2018.

Thank you for providing us the opportunity to respond. If you have any questions or need clarification of any items in this proposal, please contact Kimberly Shores at (913) 491-3388.



Kimberly Shores, FSA, MAAA
Lewis & Ellis, Inc.
11225 College Blvd., Suite 320
Overland Park, KS 66210
913-491-3388
913-642-9777 fax
KShores@lewisellis.com

Appendix A- Pricing Page

Exhibit A - Pricing Page
Actuarial Rate Review of Life and Health Related Products Filings and Consulting Services

Item#	Year:	Description	Hours:	Unit Price:	Extended Price:	Total:
1	1	Actuarial Rate Review of Life and Health Product filings and consulting services	1000	\$200	\$	\$200,000
2	2 (1st renewal)	Actuarial Rate Review of Life and Health Product filings and consulting services	1000	\$200	\$	\$200,000
3	3 (2nd renewal)	Actuarial Rate Review of Life and Health Product filings and consulting services	1000	\$200	\$	\$200,000
4	4 (3rd renewal	Actuarial Rate Review of Life and Health Product filings and consulting services	1000	\$200	\$	\$200,000
					Total Bid Amount	\$ 800,000

Note: Quantities (hours) listed above are estimates and are for evaluation purposes only. Actual need is not guaranteed or implied.

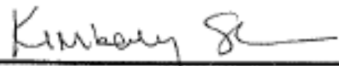
Vendor Name: Lewis & Ellis, Inc.

Address: 11225 College Blvd.
Suite 320
Overland Park, KS 66210

Email: KShores@LewisEllis.com

Fax#: 913-642-9777

Phone#: 913-491-3388

Signature: 

Date: 01-17-2017

Appendix B- Lewis & Ellis, Inc. Resumes

KIMBERLY SHORES, FSA, MAAA

Vice President

Consulting Actuary, Kansas City Office

Prior Positions

2005-2013: Coventry Health Care, Director of Actuarial Services

2001-2005: Lewis and Ellis, Sr. Actuarial Consultant

2000-2000: Business Men's Assurance, Actuarial Student

1997-2000: Americo Life, Actuarial Student

Responsibilities and Experience

- Appointed Actuary
- Reserving / IBNR
- Annual Statement Opinion
- Actuarial assistance to state insurance departments, including ACA & non-ACA rate filing review
- Medicaid rate analysis and reserving
- ACA Implementation: rate review and filing templates
- Retiree Drug Subsidy attestations and Credible Coverage determinations
- Commercial group and Individual pricing and rate adequacy
- Provider contracting analysis
- Trend analysis
- Financial forecasting (Group, Individual, Medicare)
- Budget support
- Medical expense / Medical economics research
- Additional pricing analysis: Area factors, age/gender studies, SIC studies, benefit slope, etc.
- Experience studies
- Competitive rate studies
- Rate filings and certifications

Education

William Jewell College – Liberty, Missouri

B.A., Mathematics and Chemistry


Professional

Fellow, Society of Actuaries

Member, American Academy of Actuaries

- Links to Actuarial Organizations:
- [Society of Actuaries](#)
 - [American Academy of Actuaries](#)
 - [American Society of Pension Professionals & Actuaries](#)
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Kimberly S Shores	
<p>Personal Information</p> 	<p>Designations MAAA 2004 FSA 2008</p> <p>SOA Continuing Professional Development Requirement Compliant(2014-2015) Compliant(2015-2016)</p> <p>Academic Degrees B.A.</p> <p>Other Professional Designations</p> <p>Industry Healthcare: Health Insurance</p> <p>Primary Area of Practice Health</p> <p>Specializations Employee Health Benefits Financial Reporting Health Insurance - Commercial Health Insurance - Public Systems Product Pricing/Development Regulatory Valuation/Reserving</p> <p>Society of Actuaries Sections Health Leadership & Development</p>

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CHRISTOPHER J. MERKEL, FSA, MAAA

Vice President & Principal

Consulting Actuary, Kansas City office

Prior Positions

2010-2013: Actuarial Resources Corporation, Consulting Actuary

2004-2010: Coventry Health Care, Director of Actuarial Services

1998-2004: Lewis and Ellis, Sr. Actuarial Consultant

1996-1998: Woodman Accident and Life

Responsibilities and Experience

- Reserving / IBNR
- Annual Statement Opinion
- Commercial group pricing and rate adequacy
- Individual medical pricing and rate adequacy
- Medicare Advantage: Development and certification of the annual bid process with CMS
- M&A integration
- Provider contracting analysis
- Trend analysis
- Financial forecasting (Group, Individual, Medicare)
- Budget support
- Medical expense / Medical economics research
- Additional pricing analysis: Area factors, age/gender studies, SIC studies, benefit slope, etc.
- Experience studies
- Rate filings and certifications

Education

University of Nebraska - Lincoln

B.S., Actuarial Science

Professional

Fellow, Society of Actuaries

Member, American Academy of Actuaries

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Christopher Jason Merkel

Personal Information	Designations
	MAAA 2005 FSA 2008
	SOA Continuing Professional Development Requirement Compliant(2014-2015) Compliant(2015-2016)
	Academic Degrees B.S.
	Other Professional Designations MCP
	Industry Healthcare: Health Insurance
	Primary Area of Practice Health
	Specializations Employee Health Benefits Financial Reporting Health Insurance - Commercial Health Insurance - Public Systems Marketing Predictive Analytics Product Pricing/Development Provider Systems Regulatory Valuation/Reserving
	Society of Actuaries Sections Actuary of the Future Health Technology

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KAREN E. ELSOM, FSA, MAAA

Consulting Actuary, Kansas City office

Prior Position

1988-1998: Business Men's Assurance Company, Kansas City, Missouri; Assistant Actuary

Responsibilities and Experience

- Risk focused actuarial examinations of life and health insurance companies for state insurance departments
- Development, pricing and filing of new insurance products
- Disability income and major medical rate increase development and state filings
- Medicare Supplement **annual state filings development and preparation**
- **Financial reporting: GAAP, statutory, tax and management information**
- **Development of lapse studies**
- **Small group major medical certification development and preparation**
- Evaluation of reinsurance treaties
- Annual statement development and preparation

Education

University of Nebraska - Lincoln,

B.S., Actuarial Science

Professional

Fellow, Society of Actuaries

Member, American Academy of Actuaries


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Karen E Elsom	
Personal Information	Designations
	MAAA 1990 FSA 1993
	SOA Continuing Professional Development Requirement Compliant(2014-2015) Compliant(2015-2016)
	Academic Degrees B.S.
	Other Professional Designations
	Industry Consulting
	Primary Area of Practice Health
	Specializations Financial Reporting Health Insurance - Commercial
	Society of Actuaries Sections Health

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JEFFREY D. LEE, ASA, MAAA

Assistant Vice President

Consulting Actuary, Kansas City office

Prior Positions

2008-2015: SCOR Global Life USA Reinsurance Company, Leawood, Kansas; Senior Associate Actuary

2004-2008: Employers Reassurance Company, Mission, Kansas; Valuation Actuary

2003-2004: CDR Optimal Consulting, Overland Park, Kansas; Product Development Actuary

2001-2003: Miller Newberg, Overland Park, Kansas; Consulting Actuary

1998-2001: ING Reinsurance Company, Denver, Colorado; Pricing Actuary

1991-1998: Security Life of Denver, Denver, Colorado; Pricing Actuary

Responsibilities and Experience

- Oversee the reinsurance pricing process and ensure quality control through peer reviews
- Conversion of pricing models from TAS to AXIS and set up automated process of developing models
- Long Term Care and Disability Income financial reporting
- Provide customized reinsurance programs that enhanced the financial performance and competitiveness of existing product lines for insurance companies
- Cash flow testing and financial statement preparation
- Policy filing with state insurance departments
- Development and pricing of UL, VUL, and Joint Life products
- Evaluation of health insurance company acquisition
- Illustration Regulation compliance
- Illustration software programming and testing
- Mainframe product support and administrative service work

Education

University of Colorado,

B.S., Architectural Engineering

Professional

Associate, Society of Actuaries

Member, American Academy of Actuaries


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Jeffrey David Lee

Personal Information	Designations
	MAAA 2001 ASA 2001
	SOA Continuing Professional Development Requirement Compliant(2014-2015) Compliant(2015-2016)
	Academic Degrees B.S.
	Other Professional Designations
	Industry Insurance
	Primary Area of Practice Life
	Specializations Financial Reporting Product Pricing/Development Reinsurance
	Society of Actuaries Sections Financial Reporting Product Development Reinsurance Smaller Insurance Company

Important Note: Please review the [Terms of Use](#) with regards to the usage of the Online Directory of Actuarial Memberships. The operators of the Online Directory reserve the right to restrict access to the Online Directory upon violation of these terms.

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HEATHER L. H. ROBINSON

Senior Actuarial Associate, Kansas City office

Prior Positions

- 2003-2006: The Ceres Group, Mission, Kansas; Actuarial Analyst
- 2000-2003: DeFrain Mayer, Overland Park, Kansas; Consulting Actuary
- 1998-2000: American Chambers Life Insurance Co, Lenexa, Kansas; Senior Actuarial Analyst
- 1994-1998: Centennial Life Insurance Co, Merriam, Kansas; Senior Actuarial Analyst
- 1993-1994: Providian Corporation, Louisville, Kentucky; Actuarial Student

Responsibilities and Experience

- Individual and group A & H experience analysis and rate repricing
- Medicare Supplement experience analysis and rate repricing
- Dental experience analysis and repricing
- Development and pricing of Medicaid risk products
- State-specific certification of individual and small employer A & H requirements
- Financial projections and forecasting
- In-depth utilization analysis of health plan costs
- Rate filings with state insurance departments
- Benchmarking of utilization and costs for employers
- A & H claim and contract reserves
- Annual statement preparation
- State insurance department complaint response and resolution

Education

Auburn University

B.S., Business Administration, Finance; Cum Laude

Georgia State University

Post-Baccalaureate – Actuarial Science

Professional

Society of Actuaries; Courses 1 & 2 passed

Appendix C- References

	Reference # 1
Company Name:	Iowa Insurance Division
Address:	601 Locust St., 4th Floor, Des Moines, IA 50309-3738
Contact Name and Title:	Klete Geren, Senior Actuary
Contact Phone Number:	515-281-4183
Contact E-mail:	Klete.geren@iid.iowa.gov
Contact Facsimile Number:	
Type of Service:	Rate Review
Contract number:	N/A, only an Agreement Letter
Contract Start Date:	June 2010
Contract End Date:	On Going
	Reference # 2
Company Name:	Michigan Department of Insurance and Financial Services
Address:	530 W. Allegan Street, 7th Floor, Lansing, MI 48933
Contact Name and Title:	Geno Bozzo
Contact Phone Number:	517-284-8690
Contact E-mail:	bozzoe@michigan.gov
Contact Facsimile Number:	
Type of Service:	Rate Review
Contract number:	071B5500071 (Current contract)
Contract Start Date:	October 2016 (have had contracts with MI since 1989)
Contract End Date:	On Going
	Reference # 3
Company Name:	Nevada Division of Insurance
Address:	1818 E. College Pkwy., Suite 103, Carson City, NV 89706
Contact Name and Title:	Glenn Shippey
Contact Phone Number:	775-687-0738
Contact E-mail:	gshippey@doi.nv.gov
Contact Facsimile Number:	
Type of Service:	Rate Review
Contract number:	15489
Contract Start Date:	March 2015
Contract End Date:	On Going

Appendix D- Other documents

See following pages for additional required documents.

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

Kimberly Shores, FSA, MAAA, Vice President

(Name, Title)

Kimberly Shores, FSA, MAAA, Vice President

(Printed Name and Title)

11225 College Blvd., Overland Park, KS 66210

(Address)

(913-491-3388) / (913-642-9777)

(Phone Number) / (Fax Number)

KShores@LewisEllis.com

(email address)

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that I have reviewed this Solicitation in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that I am authorized by the vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

Lewis & Ellis, Inc.

(Company)

 Vice President

(Authorized Signature) (Representative Name, Title)

Kimberly Shores, FSA, MAAA, Vice President

(Printed Name and Title of Authorized Representative)

01-17-2017

(Date)

(913-491-3388) (913-642-9777)

(Phone Number) (Fax Number)

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.:

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

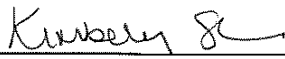
(Check the box next to each addendum received)

- | | |
|--|--|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Lewis & Ellis, Inc.

Company



Authorized Signature

01-17-2017

Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

MANDATE: Under W. Va. Code §5A-3-10a, no contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

EXCEPTION: The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. Code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Employer default" means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

"Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

AFFIRMATION: By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (*W. Va. Code §61-5-3*) that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

WITNESS THE FOLLOWING SIGNATURE:

Vendor's Name: Lewis & Ellis, Inc.

Authorized Signature:  Date: 01-17-2017

State of Kansas

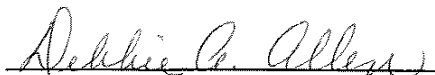
County of Johnson, to-wit:

Taken, subscribed, and sworn to before me this 17th day of January, 2017.

My Commission expires June 23, 2020

AFFIX SEAL HERE

NOTARY PUBLIC



Purchasing Affidavit (Revised 08/01/2015)

