

(PLEASE FIND THE AGENDA/TABLE OF CONTENTS ON PAGE 4.)

REGULAR MEETING OF THE BOARD OF DIRECTORS



May 7, 2019

9:30 AM

Alfredo R. Santistevan Board Room

NMRHCA Offices, Suite 207

4308 Carlisle Blvd. NE

Albuquerque, NM 87107

New Mexico Retiree Health Care Authority
Regular Meeting

BOARD OF DIRECTORS

ROLL CALL

May 7, 2019

	Member in Attendance		
Mr. Sullivan, President			
Mr. Montañño, Vice President			
Mr. Crandall, Secretary			
Mr. Propst			
Ms. Goodwin			
Mr. Linton			
Ms. Saunders			
Mr. Eichenberg			
Ms. Larranaga-Ruffy			
Mr. Rael			
Ms. Moon			

NMRHCA BOARD OF DIRECTORS

May 2019

Mr. Wayne Propst
Executive Director
Public Employees Retirement Association
33 Plaza La Prensa
Santa Fe, NM 87507
PO Box 2123
Santa Fe, NM 87504-2123
Wayne.Propst@state.nm.us
W: 505-476-9301

Mr. Lawrence Rael
100 Marquette Ave, 11th Floor
City/County Building
Albuquerque, NM 87102
F: 505-768-3700
lrael@cabq.gov

Ms. Jan Goodwin
Executive Director
Educational Retirement Board
PO Box 26129
Santa Fe, NM 87502-0129
jan.goodwin@state.nm.us
W: 505-827-8030
F: 505-827-1855

Mr. Terry Linton
Governor's Appointee
1204 Central Ave. SW
Albuquerque, NM 87102
terry@lintonandassociates.com
505-247-1530

Mr. Joe Montaño, Vice President
NM Assoc. of Educational Retirees
5304 Hattiesburg NW
Albuquerque, NM 87120
Jmountainman1939@msn.com
505- 897-9518

Ms. Pamela Moon
NM Association of Counties
One Civic Plaza
10th Floor, Suite 10045
Albuquerque, NM 87102
pmoon@bernco.gov
505-468-1407

Mr. Doug Crandall
Retired Public Employees of New Mexico
14492 E. Sweetwater Ave
Scottsdale, AZ 85259
dougcinaz@gmail.com

The Honorable Mr. Tim Eichenberg
NM State Treasurer
2055 South Pacheco Street
Suite 100 & 200
Santa Fe, NM 87505
Tim.Eichenberg@state.nm.us
W: 505-955-1120
F: 505-955-1195

Ms. Therese Saunders
NEA-NM, Classroom Teachers Assoc., & NM
Federation of Educational Employees
5811 Brahma Dr. NW
Albuquerque, NM 87120
tsaunders3@mac.com
505-934-3058

Mr. Tom Sullivan, President
Superintendents' Association of NM
800 Kiva Dr. SE
Albuquerque, NM 87123
tsullivan48@gmail.com
505-330-2600

Ms. Leanne Larranaga-Ruffy
Alternate for PERA Executive Director
33 Plaza La Prensa
Santa Fe, NM 87507
PO Box 2123
Santa Fe, NM 87504
Leanne.Larranaga@state.nm.us
505-476-9332

Regular Meeting of the
NEW MEXICO RETIREE HEALTH CARE AUTHORITY
BOARD OF DIRECTORS

May 7, 2019

9:30 AM

Alfredo R. Santistevan. Board Room

NMRHCA Offices, Suite 207

4308 Carlisle Blvd. NE

Albuquerque, NM 87107

AGENDA

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1. Call to Order	Mr. Sullivan, President	
2. Roll Call to Ascertain Quorum	Ms. Beatty, Recorder	
3. Pledge of Allegiance	Mr. Sullivan, President	
4. Approval of Agenda	Mr. Sullivan, President	4
5. Approval of Regular Meeting Minutes April 2, 2019	Mr. Sullivan, President	5
6. Public Forum and Introductions	Mr. Sullivan, President	
7. Committee Reports	Mr. Sullivan, President	
8. Executive Director's Updates	Mr. Archuleta, Executive Director	
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9. FY20 Contracts (Action Item)	Mr. Archuleta, Executive Director	78
10. Medical, Dental, Vision Consultant RFP (Action Item)	Mr. Archuleta, Executive Director	80
11. Out-of-state Travel Request (Action Item)	Mr. Archuleta, Executive Director	111
12. 2020 Preliminary Plan Discussion	Mr. Archuleta, Executive Director	112
13. Other Business	Mr. Sullivan, President	
14. Executive Session	Mr. Sullivan, President	
Pursuant to NMSA 1978, Section 10-15-1(H)(6) To Discuss Limited Personnel Matters		
15. Date & Location of Next Board Meeting	Mr. Sullivan, President	
June 4, 2019, 9:30AM		
Alfredo R. Santistevan Board Room		
4308 Carlisle Blvd. NE., Suite207		
Albuquerque, NM 87107		
16. Adjourn		

ACTION SUMMARY

RETIREE HEALTH CARE AUTHORITY/REGULAR BOARD MEETING

April 2, 2019

<u>Item</u>	<u>Action</u>	<u>Page</u>
APPROVAL OF AGENDA	Approved	3
<u>APPROVAL OF MINUTES:</u> March 5, 2019	Approved	3
<u>PUBLIC FORUM & INTRODUCTIONS</u>	Informational	3
COMMITTEE REPORTS	Informational	4
<u>EXECUTIVE DIRECTOR'S UPDATES</u> HR Update Presbyterian Health Plan/CHS Contract GASB 75 Legislative SIC Report for February	Informational	4
3RD QUARTER BUDGET REVIEW	Informational	5
FY 19 CONTRACT AMENDMENTS	Approved	5
FY 20 OPERATING BUDGET	Approved	6
OUT OF STATE TRAVEL REQUEST	Approved	6
OTHER BUSINESS [None]		
EXECUTIVE SESSION	Action taken	7

MINUTES OF THE
NEW MEXICO RETIREE HEALTH CARE AUTHORITY/BOARD OF DIRECTORS

REGULAR MEETING

April 2, 2019

1. CALL TO ORDER

A Regular Meeting of the Board of Directors of the New Mexico Retiree Health Care Authority was called to order on this date at 9:30 a.m. in the Alfredo R. Santistevan Board Room, 4308 Carlisle Boulevard, N.E., Albuquerque, New Mexico.

2. ROLL CALL TO ASCERTAIN A QUORUM

A quorum was present.

Members Present:

Mr. Tom Sullivan, President
Mr. Joe Montañño, Vice President
Mr. Doug Crandall, Secretary
The Hon. Tim Eichenberg, NM State Treasurer
Ms. Jan Goodwin
Mr. Terry Linton
Ms. Pamela Moon
Mr. Wayne Propst
Mr. Lawrence Rael
Ms. Therese Saunders

Members Excused:

None.

Staff Present:

Mr. Dave Archuleta, Executive Director
Mr. Greg Archuleta, Director of Communication & Member Engagement
Mr. Tomas Rodriguez, IT Manager
Ms. Peggy Martinez, Chief Financial Officer
Ms. Judith Beatty, Board Recorder

Others Present:

[See sign-in sheets]

3. PLEDGE OF ALLEGIANCE

Mr. Linton led the Pledge.

4. APPROVAL OF AGENDA

Mr. Crandall moved approval of the agenda, as published. Mr. Linton seconded the motion, which passed unanimously.

5. APPROVAL OF REGULAR MEETING MINUTES: March 5, 2019

Ms. Goodwin moved approval of the minutes of the March 5, 2019, meeting, as submitted. Ms. Saunders seconded the motion, which passed unanimously.

6. PUBLIC FORUM AND INTRODUCTIONS

Chairman Sullivan welcomed staff and guests.

There were no speakers from the floor.

7. COMMITTEE REPORTS

Chairman Sullivan reported that the Executive Committee met last Thursday to prepare for today's agenda.

Ms. Goodwin reported that the Finance Committee discussed a number of items, including recommending approval of the FY19 contract amendments and the FY20 operating budget.

8. EXECUTIVE DIRECTOR'S UPDATES

a. HR Update

Mr. Archuleta stated that the process of reclassifying two positions should be completed this week.

Mr. Archuleta also noted that, as of yesterday, the position of Business Operations Specialist became vacant.

Mr. Archuleta stated that SPO Director Pamela Coleman has indicated that she will work on appointing a classified state employee to the NMRHCA Board.

b. Presbyterian Health Plan/CHS Contract Negotiations

Mr. Archuleta stated that, with respect to the contract negotiations between Presbyterian Health Plan and Community Health Systems (which operates four hospitals in Southern New Mexico — Carlsbad Medical Center, Eastern New Mexico Medical Center, Lea Regional Medical Center and MountainView Regional Medical Center), no agreement has been reached at this point, and the termination date has been extended to May 31. If they cannot come to an agreement on their Medicaid contract, their commercial agreement will automatically terminate on August 31. This gives NMRHCA a greater opportunity to communicate with the 180 individuals who would be affected.

c. GASB 75

Mr. Archuleta reported that Moss Adams completed its first review in February based on the schedules provided by Segal, and CliftonLarsonAllen will be concluding its review this week. Upon completion, the Audit Committee will conduct its review and the audit will be submitted to the State Auditor's Office on June 15, well ahead of the deadline.

d. Legislative

Mr. Archuleta stated that SB 131, creating the Interagency Pharmaceuticals Purchasing Council, was signed by the Governor's Office. NMRHCA will join the Council along with the Human Services Department, Department of Health, CYFD, Risk Management Division, Public Schools Insurance Authority, APS, UNM and two Governor appointees. The group will be responsible for evaluating and considering options for containing pharmaceutical costs on behalf of the state. The first meeting is scheduled on September 1, with quarterly meetings to follow.

Mr. Archuleta stated that he anticipates the Governor will sign the bill requiring plans to cover calcification arterial screenings. The bill also removes the limits for physical therapy coverage. NMRHCA does not anticipate any significant financial impact to these changes.

Following up on his report last month on the fate of SB 95, Mr. Archuleta said that was the fifth unsuccessful attempt at increasing employer/employee contributions to the program. While discouraging, further discussion is absolutely necessary given that the agency has a finite period in which it can continue to exist, and without any action from the legislature, changes in the future will become increasingly aggressive to keep the program viable.

Mr. Archuleta stated that, as the board looks to next year, it is not too soon to begin discussing strategy now. In the interim, NMRHCA will revise its communication strategy to include employer groups. Last fall, when NMRHCA made its rule change to age 55, it became apparent that it hadn't done a good job of communicating the details of its strategic plan, the status of the program, and the rationale for changes going forward.

Board members agreed with a suggestion by Mr. Crandall that it continue this discussion in another meeting to allow for sufficient time.

The Legislative Committee agreed to meet on Thursday, April 25 at 1:00 p.m.

e. February 28, 2019 SIC Report

Mr. Archuleta reported February balances at \$667 million, a new watermark high and a \$6 million increase from the previous month.

9. 3RD QUARTER BUDGET REVIEW

Mr. Archuleta presented this report.

Highlights:

-- Contractual services expenditures are \$25 million less than last year, largely driven by the revised contract with Express Scripts.

-- Through last week, NMRHCA is almost \$35 million ahead compared to the same time frame last year, when it was \$6.9 million ahead. Before the end of the year, NMRHCA anticipates being able to contribute \$40 million to its trust fund.

Following discussion, Legislative Committee members agreed to add an item on the April 25 agenda about potentially contracting with a lobbyist.

10. FY 19 CONTRACT AMENDMENTS

Mr. Archuleta stated that NMRHCA staff proposes to amend the existing agreements with its healthcare plan partners. Each of the requested amendments is supported by increases in participation for the Presbyterian and UnitedHealthcare Medicare Advantage plans, Delta Dental and Life Insurance. The proposed increases total \$2,060,000; however, only \$1.7 million remains unencumbered and available to support upward adjustments. Therefore, the proposed amendment would include a \$300,000 reduction in the Blue Cross Blue Shield contract to “free up” budget authority to support the increases. Staff therefore requests approval to amend the compensation sections of the contracts, as follows:

- Presbyterian Health Plan Medicare Advantage -- \$625,000
- UnitedHealthcare Medicare Advantage -- \$35,000
- Delta Dental of New Mexico - \$1,075,000
- The Standard - \$325,000
- Blue Cross Blue Shield Medicare Advantage – (\$300,000)

Ms. Goodwin stated that the Finance Committee reviewed this and recommended approval.

Mr. Crandall moved for approval. Ms. Moon seconded the motion, which passed unanimously.

11. FY20 OPERATING BUDGET

Mr. Archuleta presented a high level overview of the FY20 operating budget.

Mr. Archuleta requested that the board delegate authority to the Finance Committee for final approval, inasmuch as the Finance Committee will be meeting prior to the May 1 submission deadline and before the next board meeting.

Mr. Crandall so moved. Mr. Eichenberg seconded the motion, which passed unanimously.

12. OUT-OF-STATE TRAVEL REQUEST

Mr. Archuleta requested that the board approve out-of-state travel for staff member Greg Archuleta and Board President Tom Sullivan to attend the annual Government Advisory Panel and Express Scripts Outcomes Symposium in Lake Buena Vista, Florida on May 15-17.

Mr. Eichenberg moved for approval. Mr. Rael seconded the motion, which passed unanimously.

13. OTHER BUSINESS

None.

13. EXECUTIVE SESSION: 10:20 A.M.

- **Pursuant to NMSA 1978, Section 10-15-1(H)6, to Discuss Life Insurance Procurement**

Mr. Rael moved that the board go into executive session to discuss life insurance procurement, pursuant to NMSA 1978, Section 10-15-1(H)6. Ms. Goodwin seconded the motion, which passed unanimously, with Chairman Sullivan, Vice Chairman Montaña, Secretary Crandall, Mr. Propst, Ms. Goodwin, Mr. Linton, Ms. Saunders, Mr. Eichenberg, Mr. Rael and Ms. Moon voting in favor.

The board came out of executive session at approximately 10:45 a.m. Chairman Sullivan stated that the only matter discussed was life insurance procurement.

14. DATE AND LOCATION OF NEXT BOARD MEETING:

MAY 7, 2019, 9:30 A.M.
ALFREDO R. SANTISTEVAN BOARD ROOM, STE. 207
4308 CARLISLE BLVD., N.E.
ALBUQUERQUE, NM, 87107

15. ADJOURN

Meeting adjourned at 10:50 a.m.

Accepted by:

Tom Sullivan, President

**RETIREE HEALTH CARE
AUTHORITY
OPERATING BUDGET
FY 2020**



July 1, 2019 thru June 30, 2020

May 1, 2019

To: Simon Miller, Executive Analyst
Department of Finance and Administration

From: Peggy Martinez, Chief Financial Officer *plm*
Retiree Health Care Authority

RE: Opbud2 to Opbud3 Reconciliation for FY20 Operating Budget

Please see the reconciliation of our FY20 Operating Budget below to include salary increases authorized in the 2019 General Appropriation Act, as reflected in the Personal Services and Employee Benefits Category of Program Support and supported by transfers from the Healthcare Benefits Administration Program totaling \$71,800.

HEALTH CARE BENEFITS ADMINISTRATION PROGRAM

	HB2/GAA	OPBUD2	OPBUD3	Difference	Total
Contractual Services	354,743.4	354,743.4	354,743.4	0.0	354,743.4
Other	42.0	42.0	42.0	0.0	42.0
Other Fin Uses	3,135.9	3,135.9	3,207.7	(71.8)	3,207.7
TOTAL	357,921.3	357,921.3	357,993.1	(71.8)	357,993.1

PROGRAM SUPPORT

	HB2/GAA	OPBUD2	OPBUD3	Difference	Total
Personal Services	1,981.2	1,981.2	2,053.0	(71.8)	2,053.0
Contractual Services	616.6	616.6	616.6	0.0	616.6
Other	538.1	538.1	538.1	0.0	538.1
TOTAL	3,135.9	3,135.9	3,207.7	(71.8)	3,207.7

GRAND TOTAL	361,057.2	361,057.2	361,200.8	(143.6)	361,200.8
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**FORM S-1
CERTIFICATION**

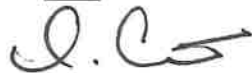
AGENCY NAME: New Mexico Retiree Health Care Authority

BUSINESS UNIT: 34300

FY20 OPERATING BUDGET CERTIFICATION

I hereby certify that the accompanying summary and detailed statements are true and correct to the best of my knowledge and belief and that the arithmetic accuracy of all numeric information has been verified.

- ☐ Yes, department-level budgets will be used this fiscal year
- ☒ No, department-level budgets will not be used this fiscal year



DAVID ARCHULETA, AGENCY HEAD

Executive Director

TITLE



TOM SULLIVAN, BOARD PRESIDENT

Board President

TITLE



PEGGY MARTINEZ, AGENCY CONTACT

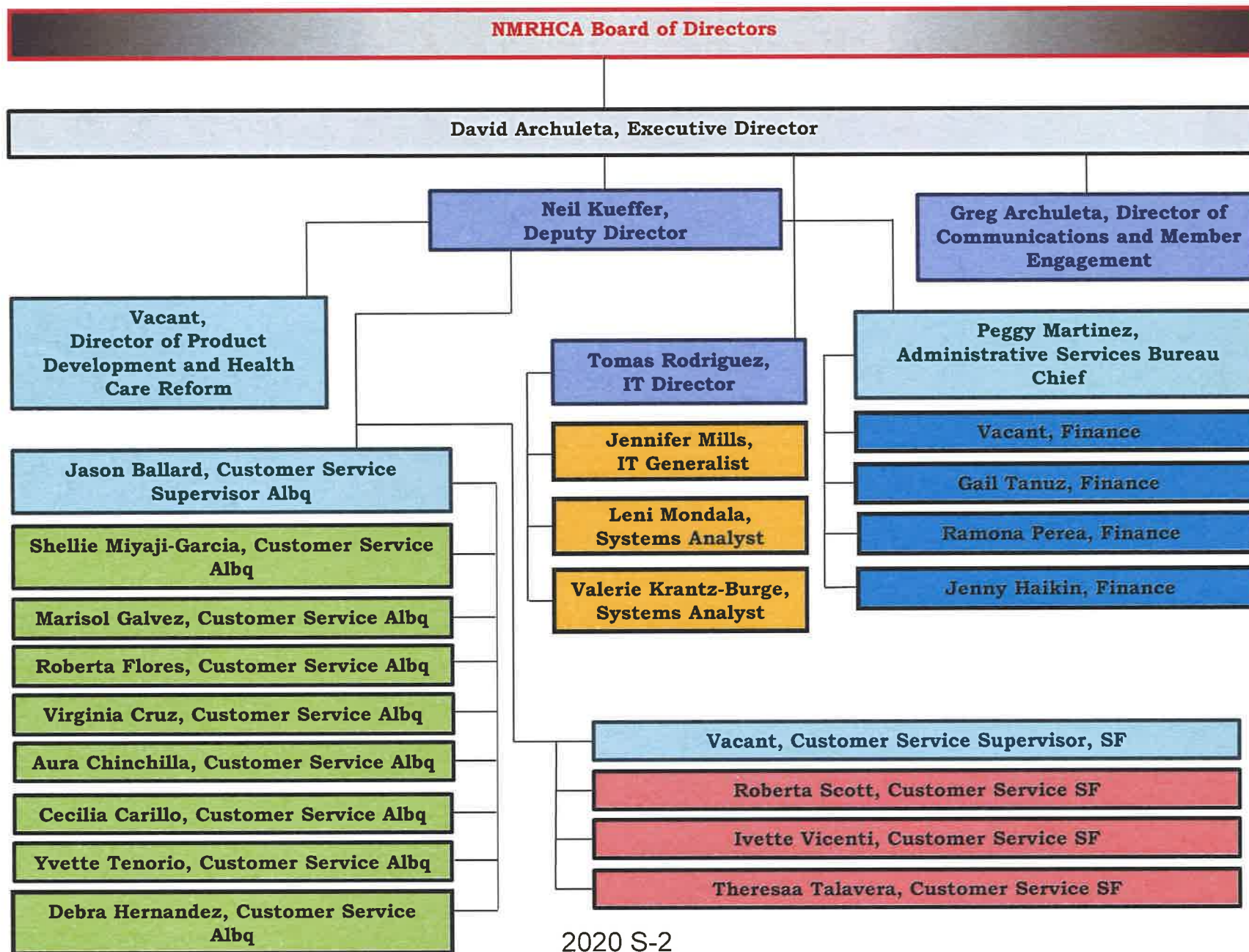
Chief Financial Officer

TITLE

4308 Carlisle Blvd, Suite 104, Albuquerque, NM 87107
ADDRESS

(505) 222-6406
PHONE NUMBER

Note: Operating Budgets of agencies headed by a board or commission must be approved by the board or commission by official action and signed by the chairperson. Operating Budgets of other agencies must be signed by the director or secretary. Operating Budgets not properly signed will be returned.



2020 S-2

**Operating Appropriations System
Department of Finance and Administration
Category Detail of Appropriations**

**OPBUD-2
BusUnit**

**Retiree Health Care Authority
BusUnit: 34300**

	General Fund	Other Sources	Other State	Internal Transf	Federal	Total
Source: General Appropriations Act						
2PS Personal services and	0.0		0.0	1,981.2	0.0	1,981.2
3CT Contractual services	0.0		354,743.4	616.6	0.0	355,360.0
4OT Other	0.0		42.0	538.1	0.0	580.1
SPC Other financing uses	0.0		3,135.9	0.0	0.0	3,135.9
General Appropriations Act	0.0		357,921.3	3,135.9	0.0	361,057.2

Source: Compensation Package (4%)

Personal services and	0.0	68.4	0.0	0.0	0.0	68.4
Compensation Package (4%)	0.0	68.4	0.0	0.0	0.0	68.4

Source: Retirement Package

Personal services and	0.0	3.4	0.0	0.0	0.0	3.4
Retirement Package	0.0	3.4	0.0	0.0	0.0	3.4

**Operating Appropriations System
Department of Finance and Administration
Category Detail of Appropriations**

**OPBUD-2
BusUnit**

Grand Total	\$0.0	\$71.8	\$357,921.3	\$3,135.9	\$0.0	\$361,129.0
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	Perm	Term	Temp
FTE Positions:	27.00	0.00	0.00

Comment:

**Operating Appropriations System
Department of Finance and Administration
Category Detail of Appropriations**

**OPBUD-2
BusUnit**

**Retiree Health Care Authority
BusUnit: 34300**

	General Fund	Other Sources	Other State	Internal Transf	Federal	Total
Source: General Appropriations Act						
2PS Personal services and	0.0		0.0	1,981.2	0.0	1,981.2
3CT Contractual services	0.0		354,743.4	616.6	0.0	355,360.0
4OT Other	0.0		42.0	538.1	0.0	580.1
SPC Other financing uses	0.0		3,135.9	0.0	0.0	3,135.9
General Appropriations Act	0.0		357,921.3	3,135.9	0.0	361,057.2

Source: Compensation Package (4%)

Personal services and	0.0	68.4	0.0	0.0	0.0	68.4
Compensation Package (4%)	0.0	68.4	0.0	0.0	0.0	68.4

Source: Retirement Package

Personal services and	0.0	3.4	0.0	0.0	0.0	3.4
Retirement Package	0.0	3.4	0.0	0.0	0.0	3.4

**Operating Appropriations System
Department of Finance and Administration
Category Detail of Appropriations**

**OPBUD-2
BusUnit**

Grand Total

\$0.0	\$71.8	\$357,921.3	\$3,135.9	\$0.0	\$361,129.0
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	Perm	Term	Temp
FTE Positions:	27.00	0.00	0.00

Comment:

Retiree Health Care Authority

BU PCode Department ReportCatg

34300 0000 0000000000 000000 D Simon Miller

Budget Review System
S-8 Financial Summary
(Dollars in Thousands)

		FY2018	FY2018	FY2019	FY2020 Agency Request			FY2020 Recommendation			FY2020
		Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total	Opbud
SOURCES											
111	General Fund Transfers	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
112	Other Transfers	2,936.8	2,936.8	3,047.6	3,166.0	0.0	3,166.0	0.0	0.0	0.0	3,207.7
120	Federal Revenues	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
130	Other Revenues	320,065.8	349,980.4	335,540.3	359,308.7	0.0	359,308.7	0.0	0.0	0.0	357,993.1
150	Fund Balance	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
REVENUE, TRANSFERS		323,002.6	352,917.2	338,587.9	362,474.7	0.0	362,474.7	0.0	0.0	0.0	361,200.8
SOURCES		323,002.6	352,917.2	338,587.9	362,474.7	0.0	362,474.7	0.0	0.0	0.0	361,200.8
USES											
200	Personal Services and Employee Benefits	1,858.8	1,767.8	1,937.5	1,981.3	0.0	1,981.3	0.0	0.0	0.0	2,053.0
300	Contractual Services	317,636.0	320,937.6	333,017.0	356,747.3	0.0	356,747.3	0.0	0.0	0.0	355,360.0
400	Other	571.0	74.6	585.8	580.1	0.0	580.1	0.0	0.0	0.0	580.1
EXPENDITURES		320,065.8	322,780.0	335,540.3	359,308.7	0.0	359,308.7	0.0	0.0	0.0	357,993.1
500	Other Financing Uses	2,936.8	2,936.8	3,047.6	3,166.0	0.0	3,166.0	0.0	0.0	0.0	3,207.7
OTHER FINANCING USES		2,936.8	2,936.8	3,047.6	3,166.0	0.0	3,166.0	0.0	0.0	0.0	3,207.7
USES		323,002.6	325,716.8	338,587.9	362,474.7	0.0	362,474.7	0.0	0.0	0.0	361,200.8
FTE POSITIONS											
810	Permanent	27.0	27.0	27.0	26.0	0.0	26.0	0.0	0.0	0.0	26.0
820	Term	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
830	Temporary	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
FTEs		27.0	27.0	27.0	26.0	0.0	26.0	0.0	0.0	0.0	26.0
FTE POSITIONS		27.0	27.0	27.0	26.0	0.0	26.0	0.0	0.0	0.0	26.0

Retiree Health Care Authority

BU PCode Department ReportCatg

34300 0000 0000000000 000000 D Simon Miller

Budget Review System

S-9 Account Code Expenditure Summary

(Dollars in Thousands)

	FY2018	FY2018	FY2019	FY2020 Agency Request			FY2020 Recommendation			FY2020
	Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total	Opbud
520100 Exempt Perm	146.2	175.5	165.5	276.1	0.0	276.1	0.0	0.0	0.0	276.1
520200 Term	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520300 Perm/Full	1,169.0	1,064.8	1,212.5	1,128.4	0.0	1,128.4	0.0	0.0	0.0	1,203.4
520400 Perm/Part	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520500 Temporary	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520600 Pd Sick Leave	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520700 Overtime	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520800 Annl/Comp Pd	0.0	12.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520900 Shift Diff	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
521100 Group Ins	189.9	176.2	196.4	197.6	0.0	197.6	0.0	0.0	0.0	197.6
521200 Retirement	220.5	210.7	219.6	232.8	0.0	232.8	0.0	0.0	0.0	232.1
521300 F.I.C.A.	105.3	91.5	105.0	107.5	0.0	107.5	0.0	0.0	0.0	105.5
521400 Workers' Comp	0.2	0.2	0.2	0.2	0.0	0.2	0.0	0.0	0.0	0.2
521410 GSD WC Premium	0.2	2.1	1.6	1.6	0.0	1.6	0.0	0.0	0.0	1.6
521500 Unempl Comp	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
521600 Empl Lblty	0.0	8.3	9.3	9.0	0.0	9.0	0.0	0.0	0.0	9.0
521700 Retiree Healthcare	27.5	24.8	27.4	28.1	0.0	28.1	0.0	0.0	0.0	27.5
521900 Other Empl Bnft	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
200 Personal Services and Employee Benefits	1,858.8	1,767.8	1,937.5	1,981.3	0.0	1,981.3	0.0	0.0	0.0	2,053.0
535100 Med Services	317,091.2	320,403.6	332,450.7	356,100.7	0.0	356,100.7	0.0	0.0	0.0	354,743.4
535200 Prof Services	304.8	361.8	344.8	399.8	0.0	399.8	0.0	0.0	0.0	399.8
535300 Other Cntrl	30.0	7.7	15.0	10.0	0.0	10.0	0.0	0.0	0.0	10.0
535309 Other Srves InterA	0.0	0.0	0.0	20.0	0.0	20.0	0.0	0.0	0.0	20.0
535310 Other Srves Comp U	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
535400 Audit	80.0	90.4	81.5	86.8	0.0	86.8	0.0	0.0	0.0	86.8
535409 Auditing Srves - I	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
535500 Attorney Fees	40.0	30.0	35.0	40.0	0.0	40.0	0.0	0.0	0.0	40.0
535600 IT Services	90.0	44.1	90.0	90.0	0.0	90.0	0.0	0.0	0.0	60.0

Retiree Health Care Authority

BU PCode Department ReportCatg

34300 0000 0000000000 000000 D Simon Miller

Budget Review System

S-9 Account Code Expenditure Summary

(Dollars in Thousands)

	FY2018	FY2018	FY2019	FY2020 Agency Request			FY2020 Recommendation			FY2020
	Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total	Opbud
535800 Capital Prof Contr	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
535900 Insurance Contr Pr	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
536000 General Admin Insu	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
300 Contractual Services	317,636.0	320,937.6	333,017.0	356,747.3	0.0	356,747.3	0.0	0.0	0.0	355,360.0
542100 Instate M & F	2.0	0.7	2.0	1.5	0.0	1.5	0.0	0.0	0.0	1.5
542200 Instate M & L	1.9	2.3	2.0	2.5	0.0	2.5	0.0	0.0	0.0	2.5
542300 Brd/Comm Exp	10.0	11.2	10.0	13.5	0.0	13.5	0.0	0.0	0.0	13.5
542400 Empl Partial Day I	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
542500 Trans Fuel/Oil	1.0	0.7	1.0	1.0	0.0	1.0	0.0	0.0	0.0	1.0
542600 Trans Parts	0.1	0.1	0.1	0.1	0.0	0.1	0.0	0.0	0.0	0.1
542700 Trans Insurance	0.2	0.0	0.2	0.2	0.0	0.2	0.0	0.0	0.0	0.2
542800 Trans Pool	4.4	5.8	4.7	4.5	0.0	4.5	0.0	0.0	0.0	4.5
542900 Trans Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543000 DGF Habitat/Land	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543009 DGF Habitat/Land I	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543100 Grounds/Rdways	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543200 Furn/Fix/Eqpmt	3.7	6.3	3.7	6.0	0.0	6.0	0.0	0.0	0.0	6.0
543300 Bldgs/Struct	3.0	4.2	3.0	4.5	0.0	4.5	0.0	0.0	0.0	4.5
543400 Property Ins	0.5	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543500 Maint Supplies	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543600 Lndry/Dry CIng	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543700 Maint Srvcs	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543820 IT Maintenance	12.6	0.0	10.0	7.5	0.0	7.5	0.0	0.0	0.0	7.5
543830 IT HW/SW Agreement	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543900 Other Maint	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544000 Suppl-Inv Exmpt IT	20.0	0.0	15.4	25.0	0.0	25.0	0.0	0.0	0.0	25.0
544100 Office Supplies	8.5	0.0	10.0	10.0	0.0	10.0	0.0	0.0	0.0	10.0
544200 Med/Lab/Prsnl Sp	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Retiree Health Care Authority

BU PCode Department ReportCatg

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Budget Review System

S-9 Account Code Expenditure Summary

(Dollars in Thousands)

	FY2018	FY2018	FY2019	FY2020 Agency Request			FY2020 Recommendation			FY2020
	Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total	Opbud
544300 Drugs	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544400 Field Supplies	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544500 Food	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544600 Kitchen Supplies	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544700 Clothing/Unfrm	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544800 Educ/Rec Spls	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544900 Invent Exempt	0.3	0.0	3.0	10.0	0.0	10.0	0.0	0.0	0.0	9.3
545600 Rep/Recording	0.0	0.0	1.0	6.0	0.0	6.0	0.0	0.0	0.0	6.0
545700 DOIT ISD Services	4.1	0.0	4.1	3.8	0.0	3.8	0.0	0.0	0.0	3.8
545710 DOIT HCM Assess	10.4	0.0	10.4	10.0	0.0	10.0	0.0	0.0	0.0	10.7
545810 DoIT Radio Comm	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
545900 Pmtng/Photo	56.0	0.0	66.0	56.0	0.0	56.0	0.0	0.0	0.0	56.0
546100 Postage/Msgr	115.9	0.0	112.0	105.0	0.0	105.0	0.0	0.0	0.0	105.0
546310 Utilities - Sewer	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546320 Utilities - Elect	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546330 Utilities - Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546340 Utilities - Ngas	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546350 Utilities - Propn	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546400 Rent/Bldg/Land	119.5	0.0	120.5	112.8	0.0	112.8	0.0	0.0	0.0	112.8
546409 Rent - Interagency	0.0	0.0	7.8	8.1	0.0	8.1	0.0	0.0	0.0	8.1
546500 Rent of Equip	57.0	0.0	51.0	46.0	0.0	46.0	0.0	0.0	0.0	46.0
546600 Telecomm	21.0	0.0	21.0	21.0	0.0	21.0	0.0	0.0	0.0	21.0
546610 DOIT Telecomm	63.6	0.0	62.1	59.8	0.0	59.8	0.0	0.0	0.0	59.8
546700 Subs and Dues	4.0	0.0	4.0	2.0	0.0	2.0	0.0	0.0	0.0	2.0
546800 Empl Trng/Educ	5.0	0.0	5.0	3.0	0.0	3.0	0.0	0.0	0.0	3.0
546810 Board Member Trng	2.0	0.0	2.0	5.0	0.0	5.0	0.0	0.0	0.0	5.0
546900 Advertising	0.2	0.0	0.2	0.5	0.0	0.5	0.0	0.0	0.0	0.5
547000 Legal Settlements	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547200 Grants/Indvdl	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Retiree Health Care Authority

BU PCode Department ReportCatg

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Budget Review System

S-9 Account Code Expenditure Summary

(Dollars in Thousands)

	FY2018	FY2018	FY2019	FY2020 Agency Request			FY2020 Recommendation			FY2020
	Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total	Opbud
547300 Care/Support	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547400 Grants/Services	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547410 Grants Pub Schools	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547420 Grants Higher Ed	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547430 Grants Native Amer	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547440 Grants to Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547450 Grants to Other Ag	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547500 Purch/Resale	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547600 Commissions Pd to	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547700 Debt Svc/Prncpl	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547800 Debt Svc/Intrst	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547900 Misc Other Exp	39.1	39.4	43.3	43.3	0.0	43.3	0.0	0.0	0.0	43.3
547999 Prior Year Expense	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548100 Land	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548110 Land - Improvement	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548200 Furn/Fixtures	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548300 IT Equip	0.0	0.0	5.0	5.0	0.0	5.0	0.0	0.0	0.0	5.0
548400 Other Equip	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548600 Animals	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548700 Lbry/Museum Acq	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548800 Auto/Aircraft/RecW	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548900 Bldgs/Struct	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
549600 O/S M & F	1.0	1.3	1.0	1.5	0.0	1.5	0.0	0.0	0.0	1.5
549700 O/S M & L	1.0	1.7	1.0	2.0	0.0	2.0	0.0	0.0	0.0	2.0
549800 O/S Board M/F	1.5	0.9	1.5	1.5	0.0	1.5	0.0	0.0	0.0	1.5
549900 O/S Board M/L	1.5	0.0	1.5	1.5	0.0	1.5	0.0	0.0	0.0	1.5
400 Other	571.0	74.6	585.8	580.1	0.0	580.1	0.0	0.0	0.0	580.1
555100 Oth Fin Uses - Int	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Retiree Health Care Authority

BU PCode Department ReportCatg

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Budget Review System

S-9 Account Code Expenditure Summary

(Dollars in Thousands)

	FY2018	FY2018	FY2019	FY2020 Agency Request			FY2020 Recommendation			FY2020
	Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total	Opbud
555106 Oth Fin Uses - Int	2,936.8	2,936.8	3,047.6	3,166.0	0.0	3,166.0	0.0	0.0	0.0	3,207.7
555200 Oth Fin Uses - Com	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
500 Other Financing Uses	2,936.8	2,936.8	3,047.6	3,166.0	0.0	3,166.0	0.0	0.0	0.0	3,207.7
Total	323,002.6	325,716.8	338,587.9	362,474.7	0.0	362,474.7	0.0	0.0	0.0	361,200.8

Budget Review System
S-13 - Detail of GSD/DoIT Line Items
(Dollars in Thousands)

			(Dollars in Thousands)		FY2020				
			FY2018	FY2019	Request		Recommendation		
BusUnit	Line Item		Actuals	Opbud	Base	Expansion	Base	Expansion	OpBud
34300	P633	Healthcare Benefits Admin							
		521410	GSD WC Premium	0.0	0.0	0.0	0.0	0.0	0.0
		521500	Unempl Comp	0.0	0.0	0.0	0.0	0.0	0.0
		521600	Empl Lblty	0.0	0.0	0.0	0.0	0.0	0.0
		521900	Other Empl Bnft	0.0	0.0	0.0	0.0	0.0	0.0
		542700	Trans Insurance	0.0	0.0	0.0	0.0	0.0	0.0
		542800	Trans Pool	0.0	0.0	0.0	0.0	0.0	0.0
		543400	Property Ins	0.0	0.0	0.0	0.0	0.0	0.0
		545700	DOIT ISD Services	0.0	0.0	0.0	0.0	0.0	0.0
		545710	DOIT HCM Assess	0.0	0.0	0.0	0.0	0.0	0.0
		545810	DoIT Radio Comm	0.0	0.0	0.0	0.0	0.0	0.0
		546610	DOIT Telecomm	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal for: 34300 P633 Healthcare Benefits Admin				0.0	0.0	0.0	0.0	0.0	0.0
34300	P634	Program Support							
		521410	GSD WC Premium	2.1	1.6	1.6	0.0	0.0	1.6
		521500	Unempl Comp	1.3	0.0	0.0	0.0	0.0	0.0
		521600	Empl Lblty	8.3	9.3	9.0	0.0	0.0	9.0
		521900	Other Empl Bnft	0.0	0.0	0.0	0.0	0.0	0.0
		542700	Trans Insurance	0.0	0.2	0.2	0.0	0.0	0.2
		542800	Trans Pool	5.8	4.7	4.5	0.0	0.0	0.0
		543400	Property Ins	0.0	0.3	0.0	0.0	0.0	0.0
		545700	DOIT ISD Services	0.0	4.1	3.8	0.0	0.0	3.8
		545710	DOIT HCM Assess	0.0	10.4	10.0	0.0	0.0	10.7
		545810	DoIT Radio Comm	0.0	0.0	0.0	0.0	0.0	0.0
		546610	DOIT Telecomm	0.0	62.1	59.8	0.0	0.0	59.8
Subtotal for: 34300 P634 Program Support				17.5	92.7	88.9	0.0	0.0	85.1
34300	P635	Discount Prescription Drug							
		521410	GSD WC Premium	0.0	0.0	0.0	0.0	0.0	0.0
		521500	Unempl Comp	0.0	0.0	0.0	0.0	0.0	0.0
		521600	Empl Lblty	0.0	0.0	0.0	0.0	0.0	0.0
		521900	Other Empl Bnft	0.0	0.0	0.0	0.0	0.0	0.0
		542700	Trans Insurance	0.0	0.0	0.0	0.0	0.0	0.0
		542800	Trans Pool	0.0	0.0	0.0	0.0	0.0	0.0

Budget Review System
S-13 - Detail of GSD/DoIT Line Items
(Dollars in Thousands)

BusUnit	Line Item		FY2018 Actuals	FY2019 Opbud	FY2020				
					Request		Recommendation		OpBud
					Base	Expansion	Base	Expansion	
	543400	Property Ins	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	545700	DOIT ISD Services	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	545710	DOIT HCM Assess	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	545810	DoIT Radio Comm	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	546610	DOIT Telecomm	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal for: 34300 P635 Discount Prescription Drug			0.0	0.0	0.0	0.0	0.0	0.0	0.0
34300	Retiree Health Care Authority		17.5	92.7	88.9	0.0	0.0	0.0	85.1

Budget Review System
S-13 - Detail of GSD/DoIT Line Items
(Dollars in Thousands)

BusUnit	Line Item	FY2018 Actuals	FY2019 Opbud	FY2020				
				Request		Recommendation		OpBud
				Base	Expansion	Base	Expansion	
	Grand Total	17.5	92.7	88.9	0.0	0.0	0.0	85.1

Totals by Line Item

521410 - Worker's Compensation - GSD Premium	2.1	1.6	1.6	0.0	0.0	0.0	1.6
521500 - Unemployment Compensation	1.3	0.0	0.0	0.0	0.0	0.0	0.0
521600 - Employee Liability	8.3	9.3	9.0	0.0	0.0	0.0	9.0
521900 - ERP Assessment	0.0	0.0	0.0	0.0	0.0	0.0	0.0
542700 - Transportation Insurance	0.0	0.2	0.2	0.0	0.0	0.0	0.2
542800 - Transportation Pool	5.8	4.7	4.5	0.0	0.0	0.0	0.0
543400 - Property Insurance	0.0	0.3	0.0	0.0	0.0	0.0	0.0
545700 - ISD Services	0.0	4.1	3.8	0.0	0.0	0.0	3.8
545710 - GSD HRMS Fee	0.0	10.4	10.0	0.0	0.0	0.0	10.7
545810 - GSD Radio Communication	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546200 - Bond Premiums	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546610 - GSD Telecommunications	0.0	62.1	59.8	0.0	0.0	0.0	59.8

Business Unit (Agency)	Class Code
34300	D0000
Date	Budget Reference
7/1/2019	120

State of New Mexico
Budget Review System
Operating Budget Input Form
OPBUD-3

Agency Name Retiree Health Care Authority

Fund/Business Unit/ Department (Fund/Agency/Program)	Account Code	Source of Funds or Expenditure Category	Account Code Detail Amounts	Total Amount by Account Code
REVENUE (Budgeted Sources)				
Withholding Taxes				
SHARE Revenue Budget Journal	34320OPR01			
38100 / 34300 / P633	402101	Withholding Taxes	32,935,700	
38100 / 34300 / P633	441203	Interest On Investments	100,000	
38100 / 34300 / P633	471508	Employer Contr-Retiree Ins	124,696,700	
38100 / 34300 / P633	471608	Retiree Contr-Retiree Ins.	170,030,000	
38100 / 34300 / P633	496903	Miscellaneous Revenue	30,230,700	
Subtotal of Other Revenues				357,993,100
TOTAL REVENUE				357,993,100

APPROPRIATION (Budgeted Expenditures)

SHARE Appropriation Budget Journal	34320OPA01			
38100 / 34300 / P633	300	Contractual Services	354,743,400	
38100 / 34300 / P633	400	Other	42,000	
38100 / 34300 / P633	500	Other Financing Uses	3,207,700	
TOTAL APPROPRIATION				357,993,100

FOR DFA USE ONLY

Control Number _____

SBD Analyst _____

SBD Director _____

Financial Control _____

Signature: _____


Chief Financial Officer

Business Unit (Agency)	Class Code
34300	D0000
Date	Budget Reference
7/1/2019	120

State of New Mexico
Budget Review System
Operating Budget Input Form
OPBUD-3

Agency Name Retiree Health Care Authority

Fund/Business Unit/ Department (Fund/Agency/Program)	Account Code	Source of Funds or Expenditure Category	Account Code Detail Amounts	Total Amount by Account Code
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REVENUE (Budgeted Sources)

Other Financing Sources - Interagency

SHARE Revenue Budget Journal 34320OPR02

38000 / 34300 / P634	499905	Other Financing Sources	3,207,700	
Subtotal of Other Transfers				3,207,700
TOTAL REVENUE				3,207,700

APPROPRIATION (Budgeted Expenditures)

SHARE Appropriation Budget Journal 34320OPA02

38000 / 34300 / P634	200	Personal Services / Employee benefits	2,053,000	
38000 / 34300 / P634	300	Contractual Services	616,600	
38000 / 34300 / P634	400	Other	538,100	
TOTAL APPROPRIATION				3,207,700

FOR DFA USE ONLY

Control Number _____

SBD Analyst _____

SBD Director _____

Financial Control _____

Signature: _____


Chief Financial Officer

Program Support

BU PCode Department ReportCatg

34300 P634 1000000000 000000 D Simon Miller

Budget Review System
S-8 Financial Summary
(Dollars in Thousands)

		FY2018	FY2018	FY2019	FY2020 Agency Request		FY2020 Recommendation			FY2020
		Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total
										Opbud
SOURCES										
111	General Fund Transfers	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
112	Other Transfers	2,936.8	2,936.8	3,047.6	3,166.0	0.0	3,166.0	0.0	0.0	3,207.7
120	Federal Revenues	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
130	Other Revenues	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
150	Fund Balance	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
REVENUE, TRANSFERS		2,936.8	2,936.8	3,047.6	3,166.0	0.0	3,166.0	0.0	0.0	3,207.7
SOURCES		2,936.8	2,936.8	3,047.6	3,166.0	0.0	3,166.0	0.0	0.0	3,207.7
USES										
200	Personal Services and Employee Benefits	1,858.8	1,767.8	1,937.5	1,981.3	0.0	1,981.3	0.0	0.0	2,053.0
300	Contractual Services	544.8	534.0	566.3	646.6	0.0	646.6	0.0	0.0	616.6
400	Other	533.2	35.2	543.8	538.1	0.0	538.1	0.0	0.0	538.1
EXPENDITURES		2,936.8	2,337.0	3,047.6	3,166.0	0.0	3,166.0	0.0	0.0	3,207.7
500	Other Financing Uses	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OTHER FINANCING USES		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
USES		2,936.8	2,337.0	3,047.6	3,166.0	0.0	3,166.0	0.0	0.0	3,207.7
FTE POSITIONS										
810	Permanent	27.0	27.0	27.0	26.0	0.0	26.0	0.0	0.0	26.0
820	Term	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
830	Temporary	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
FTEs		27.0	27.0	27.0	26.0	0.0	26.0	0.0	0.0	26.0
FTE POSITIONS		27.0	27.0	27.0	26.0	0.0	26.0	0.0	0.0	26.0

Program Support

BU PCode Department ReportCatg

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Budget Review System

S-9 Account Code Expenditure Summary

(Dollars in Thousands)

	FY2018	FY2018	FY2019	FY2020 Agency Request			FY2020 Recommendation			FY2020
	Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total	Opbud
520100 Exempt Perm	146.2	175.5	165.5	276.1	0.0	276.1	0.0	0.0	0.0	276.1
520200 Term	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520300 Perm/Full	1,169.0	1,064.8	1,212.5	1,128.4	0.0	1,128.4	0.0	0.0	0.0	1,203.4
520400 Perm/Part	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520500 Temporary	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520600 Pd Sick Leave	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520700 Overtime	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520800 Annl/Comp Pd	0.0	12.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520900 Shift Diff	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
521100 Group Ins	189.9	176.2	196.4	197.6	0.0	197.6	0.0	0.0	0.0	197.6
521200 Retirement	220.5	210.7	219.6	232.8	0.0	232.8	0.0	0.0	0.0	232.1
521300 F.I.C.A.	105.3	91.5	105.0	107.5	0.0	107.5	0.0	0.0	0.0	105.5
521400 Workers' Comp	0.2	0.2	0.2	0.2	0.0	0.2	0.0	0.0	0.0	0.2
521410 GSD WC Premium	0.2	2.1	1.6	1.6	0.0	1.6	0.0	0.0	0.0	1.6
521500 Unempl Comp	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
521600 Empl Lbly	0.0	8.3	9.3	9.0	0.0	9.0	0.0	0.0	0.0	9.0
521700 Retiree Healthcare	27.5	24.8	27.4	28.1	0.0	28.1	0.0	0.0	0.0	27.5
521900 Other Empl Bnft	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
200 Personal Services and Employee Benefits	1,858.8	1,767.8	1,937.5	1,981.3	0.0	1,981.3	0.0	0.0	0.0	2,053.0
535100 Med Services	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
535200 Prof Services	304.8	361.8	344.8	399.8	0.0	399.8	0.0	0.0	0.0	399.8
535300 Other Cntrl	30.0	7.7	15.0	10.0	0.0	10.0	0.0	0.0	0.0	10.0
535309 Other Svcs InterA	0.0	0.0	0.0	20.0	0.0	20.0	0.0	0.0	0.0	20.0
535310 Other Svcs Comp U	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
535400 Audit	80.0	90.4	81.5	86.8	0.0	86.8	0.0	0.0	0.0	86.8
535409 Auditing Svcs - I	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
535500 Attorney Fees	40.0	30.0	35.0	40.0	0.0	40.0	0.0	0.0	0.0	40.0
535600 IT Services	90.0	44.1	90.0	90.0	0.0	90.0	0.0	0.0	0.0	60.0

Program Support

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Budget Review System

S-9 Account Code Expenditure Summary

(Dollars in Thousands)

	FY2018	FY2018	FY2019	----- FY2020 Agency Request -----			----- FY2020 Recommendation -----			FY2020
	Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total	Opbud
535800 Capital Prof Contr	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
535900 Insurance Contr Pr	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
536000 General Admin Insu	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
300 Contractual Services	544.8	534.0	566.3	646.6	0.0	646.6	0.0	0.0	0.0	616.6
542100 Instate M & F	2.0	0.7	2.0	1.5	0.0	1.5	0.0	0.0	0.0	1.5
542200 Instate M & L	1.9	2.3	2.0	2.5	0.0	2.5	0.0	0.0	0.0	2.5
542300 Brd/Comm Exp	10.0	11.2	10.0	13.5	0.0	13.5	0.0	0.0	0.0	13.5
542400 Empl Partial Day I	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
542500 Trans Fuel/Oil	1.0	0.7	1.0	1.0	0.0	1.0	0.0	0.0	0.0	1.0
542600 Trans Parts	0.1	0.1	0.1	0.1	0.0	0.1	0.0	0.0	0.0	0.1
542700 Trans Insurance	0.2	0.0	0.2	0.2	0.0	0.2	0.0	0.0	0.0	0.2
542800 Trans Pool	4.4	5.8	4.7	4.5	0.0	4.5	0.0	0.0	0.0	4.5
542900 Trans Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543000 DGF Habitat/Land	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543009 DGF Habitat/Land I	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543100 Grounds/Rdways	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543200 Furn/Fix/Eqpmt	3.7	6.3	3.7	6.0	0.0	6.0	0.0	0.0	0.0	6.0
543300 Bldgs/Struct	3.0	4.2	3.0	4.5	0.0	4.5	0.0	0.0	0.0	4.5
543400 Property Ins	0.5	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543500 Maint Supplies	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543600 Lndry/Dry Clng	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543700 Maint Srvc	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543820 IT Maintenance	12.6	0.0	10.0	7.5	0.0	7.5	0.0	0.0	0.0	7.5
543830 IT HW/SW Agreement	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543900 Other Maint	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544000 Suppl-Inv Exmpt IT	20.0	0.0	15.4	25.0	0.0	25.0	0.0	0.0	0.0	25.0
544100 Office Supplies	8.5	0.0	10.0	10.0	0.0	10.0	0.0	0.0	0.0	10.0
544200 Med/Lab/Prsnl Sp	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Program Support

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Budget Review System

S-9 Account Code Expenditure Summary

(Dollars in Thousands)

	FY2018	FY2018	FY2019	FY2020 Agency Request			FY2020 Recommendation			FY2020
	Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total	Opbud
544300 Drugs	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544400 Field Supplies	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544500 Food	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544600 Kitchen Supplies	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544700 Clothing/Unfrm	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544800 Educ/Rec Spls	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544900 Invent Exempt	0.3	0.0	3.0	10.0	0.0	10.0	0.0	0.0	0.0	9.3
545600 Rep/Recording	0.0	0.0	1.0	6.0	0.0	6.0	0.0	0.0	0.0	6.0
545700 DOIT ISD Services	4.1	0.0	4.1	3.8	0.0	3.8	0.0	0.0	0.0	3.8
545710 DOIT HCM Assess	10.4	0.0	10.4	10.0	0.0	10.0	0.0	0.0	0.0	10.7
545810 DoIT Radio Comm	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
545900 Prntng/Photo	56.0	0.0	66.0	56.0	0.0	56.0	0.0	0.0	0.0	56.0
546100 Postage/Msgr	115.9	0.0	112.0	105.0	0.0	105.0	0.0	0.0	0.0	105.0
546310 Utilities - Sewer	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546320 Utilities - Elect	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546330 Utilities - Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546340 Utilities - Ngas	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546350 Utilities - Propn	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546400 Rent/Bldg/Land	119.5	0.0	120.5	112.8	0.0	112.8	0.0	0.0	0.0	112.8
546409 Rent - Interagency	0.0	0.0	7.8	8.1	0.0	8.1	0.0	0.0	0.0	8.1
546500 Rent of Equip	57.0	0.0	51.0	46.0	0.0	46.0	0.0	0.0	0.0	46.0
546600 Telecomm	21.0	0.0	21.0	21.0	0.0	21.0	0.0	0.0	0.0	21.0
546610 DOIT Telecomm	63.6	0.0	62.1	59.8	0.0	59.8	0.0	0.0	0.0	59.8
546700 Subs and Dues	4.0	0.0	4.0	2.0	0.0	2.0	0.0	0.0	0.0	2.0
546800 Empl Trng/Educ	5.0	0.0	5.0	3.0	0.0	3.0	0.0	0.0	0.0	3.0
546810 Board Member Trng	2.0	0.0	2.0	5.0	0.0	5.0	0.0	0.0	0.0	5.0
546900 Advertising	0.2	0.0	0.2	0.5	0.0	0.5	0.0	0.0	0.0	0.5
547000 Legal Settlements	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547200 Grants/Indvdl	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Program Support

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Budget Review System

S-9 Account Code Expenditure Summary

(Dollars in Thousands)

	FY2018	FY2018	FY2019	FY2020 Agency Request			FY2020 Recommendation			FY2020
	Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total	Opbud
547300 Care/Support	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547400 Grants/Services	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547410 Grants Pub Schools	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547420 Grants Higher Ed	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547430 Grants Native Amer	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547440 Grants to Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547450 Grants to Other Ag	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547500 Purch/Resale	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547600 Commissions Pd to	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547700 Debt Svc/Pncpl	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547800 Debt Svc/Intrst	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547900 Misc Other Exp	1.3	0.0	1.3	1.3	0.0	1.3	0.0	0.0	0.0	1.3
547999 Prior Year Expense	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548100 Land	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548110 Land - Improvement	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548200 Furn/Fixtures	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548300 IT Equip	0.0	0.0	5.0	5.0	0.0	5.0	0.0	0.0	0.0	5.0
548400 Other Equip	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548600 Animals	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548700 Lbry/Museum Acq	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548800 Auto/Aircraft/RecW	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548900 Bldgs/Struct	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
549600 O/S M & F	1.0	1.3	1.0	1.5	0.0	1.5	0.0	0.0	0.0	1.5
549700 O/S M & L	1.0	1.7	1.0	2.0	0.0	2.0	0.0	0.0	0.0	2.0
549800 O/S Board M/F	1.5	0.9	1.5	1.5	0.0	1.5	0.0	0.0	0.0	1.5
549900 O/S Board M/L	1.5	0.0	1.5	1.5	0.0	1.5	0.0	0.0	0.0	1.5
400 Other	533.2	35.2	543.8	538.1	0.0	538.1	0.0	0.0	0.0	538.1
555100 Oth Fin Uses - Int	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Program Support

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Budget Review System

S-9 Account Code Expenditure Summary

(Dollars in Thousands)

	FY2018	FY2018	FY2019	----- FY2020 Agency Request -----			----- FY2020 Recommendation -----			FY2020
	Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total	Opbud
555106 Oth Fin Uses - Int	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
555200 Oth Fin Uses - Com	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
500 Other Financing Uses	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	2,936.8	2,337.0	3,047.6	3,166.0	0.0	3,166.0	0.0	0.0	0.0	3,207.7

Budget Review System
R-2 Detail of Other Transfers
Revenue Account Code 112
(Dollars in Thousands)

Program Support

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Receiving Fund Revenue Acct	----- Operating Transfers In -----		FY2018 Actuals	FY2019 Opbud	----- FY2020 Agency Request -----			FY2020 Opbud
	1) Origin BusUnit / PCode / Fund	2) Descriptor			Base Budget	Expansion	Total Request	
38000 499906	1) 34300 P633	2) Compensation package	\$0.0	\$32.4	\$0.0	\$0.0	\$0.0	\$71.8
38000 499906	1) 34300 P633	2) Program Support transfer	\$2,936.8	\$3,015.2	\$3,166.0	\$0.0	\$3,166.0	\$3,135.9
TOTALS			\$2,936.8	\$3,047.6	\$3,166.0	\$0.0	\$3,166.0	\$3,207.7

Monday, April 22, 2019

Revision no. _____ Revision date _____

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Healthcare Benefits Administration
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Budget Review System
S-8 Financial Summary
 (Dollars in Thousands)

		FY2018	FY2018	FY2019	FY2020 Agency Request		FY2020 Recommendation			FY2020
		Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total
										Opbud
SOURCES										
111	General Fund Transfers	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
112	Other Transfers	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
120	Federal Revenues	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
130	Other Revenues	320,065.8	349,980.4	335,540.3	359,308.7	0.0	359,308.7	0.0	0.0	357,993.1
150	Fund Balance	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
REVENUE, TRANSFERS		320,065.8	349,980.4	335,540.3	359,308.7	0.0	359,308.7	0.0	0.0	357,993.1
SOURCES		320,065.8	349,980.4	335,540.3	359,308.7	0.0	359,308.7	0.0	0.0	357,993.1
USES										
200	Personal Services and Employee Benefits	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
300	Contractual Services	317,091.2	320,403.6	332,450.7	356,100.7	0.0	356,100.7	0.0	0.0	354,743.4
400	Other	37.8	39.4	42.0	42.0	0.0	42.0	0.0	0.0	42.0
EXPENDITURES		317,129.0	320,443.0	332,492.7	356,142.7	0.0	356,142.7	0.0	0.0	354,785.4
500	Other Financing Uses	2,936.8	2,936.8	3,047.6	3,166.0	0.0	3,166.0	0.0	0.0	3,207.7
OTHER FINANCING USES		2,936.8	2,936.8	3,047.6	3,166.0	0.0	3,166.0	0.0	0.0	3,207.7
USES		320,065.8	323,379.8	335,540.3	359,308.7	0.0	359,308.7	0.0	0.0	357,993.1
FTE POSITIONS										
810	Permanent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
820	Term	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
830	Temporary	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
FTEs		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
FTE POSITIONS		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

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Budget Review System

S-9 Account Code Expenditure Summary

(Dollars in Thousands)

	FY2018	FY2018	FY2019	FY2020 Agency Request			FY2020 Recommendation			FY2020
	Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total	Opbud
520100 Exempt Perm	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520200 Term	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520300 Perm/Full	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520400 Perm/Part	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520500 Temporary	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520600 Pd Sick Leave	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520700 Overtime	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520800 Annl/Comp Pd	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520900 Shift Diff	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
521100 Group Ins	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
521200 Retirement	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
521300 F.I.C.A.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
521400 Workers' Comp	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
521410 GSD WC Premium	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
521500 Unempl Comp	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
521600 Empl Lblty	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
521700 Retiree Healthcare	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
521900 Other Empl Bnft	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
200 Personal Services and Employee Benefits	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
535100 Med Services	317,091.2	320,403.6	332,450.7	356,100.7	0.0	356,100.7	0.0	0.0	0.0	354,743.4
535200 Prof Services	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
535300 Other Cntrl	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
535309 Other Svcs InterA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
535310 Other Svcs Comp U	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
535400 Audit	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
535409 Auditing Svcs - I	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
535500 Attorney Fees	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
535600 IT Services	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

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S-9 Account Code Expenditure Summary

(Dollars in Thousands)

	FY2018	FY2018	FY2019	FY2020 Agency Request			FY2020 Recommendation			FY2020
	Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total	Opbud
535800 Capital Prof Contr	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
535900 Insurance Contr Pr	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
536000 General Admin Insu	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
300 Contractual Services	317,091.2	320,403.6	332,450.7	356,100.7	0.0	356,100.7	0.0	0.0	0.0	354,743.4
542100 Instate M & F	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
542200 Instate M & L	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
542300 Brd/Comm Exp	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
542400 Empl Partial Day I	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
542500 Trans Fuel/Oil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
542600 Trans Parts	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
542700 Trans Insurance	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
542800 Trans Pool	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
542900 Trans Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543000 DGF Habitat/Land	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543009 DGF Habitat/Land I	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543100 Grounds/Rdways	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543200 Furn/Fix/Eqpmt	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543300 Bldgs/Struct	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543400 Property Ins	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543500 Maint Supplies	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543600 Lndry/Dry Clng	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543700 Maint Srvc	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543820 IT Maintenance	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543830 IT HW/SW Agreement	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
543900 Other Maint	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544000 Suppl-Inv Exmpt IT	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544100 Office Supplies	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544200 Med/Lab/Prsnl Sp	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

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S-9 Account Code Expenditure Summary

(Dollars in Thousands)

	FY2018	FY2018	FY2019	FY2020 Agency Request			FY2020 Recommendation			FY2020
	Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total	Opbud
544300 Drugs	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544400 Field Supplies	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544500 Food	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544600 Kitchen Supplies	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544700 Clothing/Unfrm	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544800 Educ/Rec Spls	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
544900 Invent Exempt	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
545600 Rep/Recording	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
545700 DOIT ISD Services	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
545710 DOIT HCM Assess	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
545810 DoIT Radio Comm	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
545900 Prntng/Photo	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546100 Postage/Msgsr	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546310 Utilities - Sewer	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546320 Utilities - Elect	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546330 Utilities - Water	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546340 Utilities - Ngas	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546350 Utilities - Propn	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546400 Rent/Bldg/Land	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546409 Rent - Interagency	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546500 Rent of Equip	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546600 Telecomm	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546610 DOIT Telecomm	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546700 Subs and Dues	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546800 Empl Trng/Educ	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546810 Board Member Trng	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
546900 Advertising	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547000 Legal Settlements	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547200 Grants/Indvdl	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

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Budget Review System

S-9 Account Code Expenditure Summary

(Dollars in Thousands)

	FY2018	FY2018	FY2019	FY2020 Agency Request			FY2020 Recommendation			FY2020
	Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total	Opbud
547300 Care/Support	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547400 Grants/Services	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547410 Grants Pub Schools	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547420 Grants Higher Ed	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547430 Grants Native Amer	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547440 Grants to Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547450 Grants to Other Ag	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547500 Purch/Resale	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547600 Commissions Pd to	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547700 Debt Svc/Pncpl	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547800 Debt Svc/Intrst	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547900 Misc Other Exp	37.8	39.4	42.0	42.0	0.0	42.0	0.0	0.0	0.0	42.0
547999 Prior Year Expense	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548100 Land	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548110 Land - Improvement	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548200 Furn/Fixtures	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548300 IT Equip	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548400 Other Equip	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548600 Animals	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548700 Lbry/Museum Acq	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548800 Auto/Aircraft/RecW	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
548900 Bldgs/Struct	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
549600 O/S M & F	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
549700 O/S M & L	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
549800 O/S Board M/F	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
549900 O/S Board M/L	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
400 Other	37.8	39.4	42.0	42.0	0.0	42.0	0.0	0.0	0.0	42.0
555100 Oth Fin Uses - Int	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

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S-9 Account Code Expenditure Summary

(Dollars in Thousands)

	FY2018	FY2018	FY2019	FY2020 Agency Request			FY2020 Recommendation			FY2020
	Opbud	Actuals	Opbud	Base	Expansion	Total	Base	Expansion	Total	Opbud
555106 Oth Fin Uses - Int	2,936.8	2,936.8	3,047.6	3,166.0	0.0	3,166.0	0.0	0.0	0.0	3,207.7
555200 Oth Fin Uses - Com	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
500 Other Financing Uses	2,936.8	2,936.8	3,047.6	3,166.0	0.0	3,166.0	0.0	0.0	0.0	3,207.7
Total	320,065.8	323,379.8	335,540.3	359,308.7	0.0	359,308.7	0.0	0.0	0.0	357,993.1

Budget Review System
R-4 Detail of Other Revenues
Revenue Account Code 130
(Dollars in Thousands)

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Fund Code	Revenue Account Code	Description of Other Revenue by Source	FY2018 Actuals	FY2019 Opbud	----- FY2020 Agency Request -----			FY2020 Op Bud
					Base Budget	Program Change	Total Request	
38100	402101	Withholding Taxes	\$24,068.2	\$29,406.9	\$32,935.7	\$0.0	\$32,935.7	\$32,935.7
38100	441203	Interest On Investments	\$146.8	\$60.0	\$100.0	\$0.0	\$100.0	\$100.0
38100	471508	Employer Contr-Retiree Ins	\$127,055.6	\$128,325.1	\$128,325.1	\$0.0	\$128,325.1	\$124,696.7
38100	471608	Retiree Contr.-Retiree Ins.	\$167,906.8	\$150,517.6	\$167,717.2	\$0.0	\$167,717.2	\$170,030.0
38100	496903	Miscellaneous Revenue	\$30,803.0	\$27,230.7	\$30,230.7	\$0.0	\$30,230.7	\$30,230.7
TOTALS			\$349,980.4	\$335,540.3	\$359,308.7	\$0.0	\$359,308.7	\$357,993.1

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Budget Review System
Detail of Other Financing Uses
Expenditure Account Code 500
(Dollars in Thousands)

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Operating Transfers Out			FY2018 (2016-2017) Actuals	FY2019 (2017-2018) Opbud (Rev)	----- FY2020 Agency Request -----			FY2020 (2018-2019) Opbud
----- Destination -----					Base Budget	Expansion	Total Request	
Business Unit / PCode / Fund								
34300	P634	38100	\$0.0	\$32.4	\$0.0	\$0.0	\$0.0	\$71.8
34300	P634	38100	\$2,936.8	\$3,015.2	\$3,166.0	\$0.0	\$3,166.0	\$3,135.9
TOTALS			\$2,936.8	\$3,047.6	\$3,166.0	\$0.0	\$3,166.0	\$3,207.7

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Budget Review System

E-1 Personnel Listing

Program Support

BU PCode Department

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Org Structure Position No. LineCode	Annv Date	Employee Name Employee No. FTE PayPlan	Employee Grade Status Spec	Position Grade Status Spec	Proj Hourly	Projected Annual Salary Over 128400	RTW	Ins Carrier Ins Range	Ins Prem
34300 P634 1000000000			55	55	18.720	\$39,237		Presbyterian - HMO	
00021748	4/13/2013	344900	A			\$0		PRESHA4	
003	1.00	1	R4061A	R4061A ELIGIBILITY INTERVIEWER, GOVT PRG					16,372
34300 P634 1000000000			80	80	39.737	\$83,289		Presbyterian - HMO	
00021748	8/1/2012	105223	A			\$0		PRESHC3	
003	1.00	1	X53032	X53032 CHIEF FINANCIAL OFFICER II					7,656
34300 P634 1000000000		VACANT	75	75	27.719	\$58,099		Presbyterian - HMO	
00021747	1/31/2013	122119	A			\$0		PRESHB1	
003	1.00	1	D2011A	D2011A ACTUARY-A					4,899
34300 P634 1000000000		Greg Archuleta	18	18	25.756	\$53,985		Presbyterian - HMO	
00021748	5/23/2013	345331	A			\$0		PRESHB4	
001	1.00	2	007020	007020 Administrative Assistant I					14,333
34300 P634 1000000000			55	55	18.720	\$39,237		Presbyterian - HMO	
00021748	9/28/2012	322998	A			\$0		PRESHA1	
003	1.00	1	R4061A	R4061A ELIGIBILITY INTERVIEWER, GOVT PRG					5,592
34300 P634 1000000000			55	55	22.265	\$46,667		Presbyterian - HMO	
00021748	11/10/2012	117464	A			\$0		PRESHA1	
003	1.00	1	C2099A	C2099A FINANCIAL SPECIALIST, ALL OTHER-A					5,592
34300 P634 1000000000			ID	ID	24.830	\$52,044		Presbyterian - HMO	
00021748	9/13/2012	316842	A			\$0		PRESHB4	
003	1.00	1	INEA20	INEA20 IT NETWORK ADMINISTRATOR I					14,333
34300 P634 1000000000			IF	IF	48.110	\$100,839		None	
00021748	1/28/2013	115649	A			\$0		NoneCN	
003	1.00	1	IXGS26	IXGS26 IT TECHNOLOGY OFFICER					0
34300 P634 1000000000		David Archuleta	36	36	63.750	\$133,620		Presbyterian - HMO	
00027827	6/5/2013	123222	A			\$5,220		PRESHC4	
001	1.00	2	007385	007385 Executive Director					12,293
34300 P634 1000000000		VACANT	65	65	22.464	\$47,085		Presbyterian - HMO	
00029707	1/17/2013	108817	A			\$0		PRESHA1	
003	1.00	1	C1199S	C1199S BUSINESS OPERATIONS SPECIALIST,					5,592
34300 P634 1000000000			55	55	20.438	\$42,838		Presbyterian - HMO	
00021748	4/19/2013	313849	A			\$0		PRESHA2	
003	1.00	1	R4061A	R4061A ELIGIBILITY INTERVIEWER, GOVT PRG					12,375
34300 P634 1000000000			55	55	20.438	\$42,838		Presbyterian - HMO	
00021748	2/4/2013	100105	A			\$0		PRESHA2	
003	1.00	1	R4061A	R4061A ELIGIBILITY INTERVIEWER, GOVT PRG					12,375
34300 P634 1000000000			50	50	17.982	\$37,690		BC/BS - HMO	
00021748	8/28/2012	343643				\$0		BCBSHA1	
003	1.00	1	R4061O	R4061O ELIGIBILITY INTERVIEWER, GOVT PRG					5,592

Budget Review System

E-1 Personnel Listing

Program Support

BU PCode Department

34300 P634 1000000000

Org Structure	Employee Name	Employee No.	Employee Grade	Position	Proj Hourly	Projected Annual Salary Over 128400	RTW	Ins Carrier	Ins Range	Ins Prem
Position No.	Annv Date	FTE	Status	Spec						
LineCode		PayPlan								
34300 P634 1000000000			55	55	19.842	\$41,589		Presbyterian - HMO		
	1/1/2013		A			\$0		PRESHA1		
003		1.00 1	R4061A	R4061A ELIGIBILITY INTERVIEWER, GOVT PRG						5,592
34300 P634 1000000000			55	55	18.344	\$38,449		Presbyterian - HMO		
	1/28/2013 111358		A			\$0		PRESHA1		
003		1.00 1	C1199O	C1199O BUSINESS OPERATIONS SPECIALIST,						5,592
34300 P634 1000000000			65	65	28.124	\$58,948		BC/BS - HMO		
	8/2/2012 310773		A			\$0		BCBSHB4		
003		1.00 1	C1199S	C1199S BUSINESS OPERATIONS SPECIALIST,						14,333
34300 P634 1000000000			55	55	18.100	\$37,938		Presbyterian - HMO		
	1/1/2013		A			\$0		PRESHA1		
003		1.00 1	R4061A	R4061A ELIGIBILITY INTERVIEWER, GOVT PRG						5,592
34300 P634 1000000000	VACANT		60	60	20.103	\$42,136		Presbyterian - HMO		
00080177	1/28/2013 313292		A			\$0		PRESHA1		
003		1.00 1	C1199A	C1199A BUSINESS OPERATIONS SPECIALIST,						5,592
34300 P634 1000000000			50	50	16.708	\$35,020		Presbyterian - HMO		
	11/7/2012 118734		A			\$0		PRESHA1		
003		1.00 1	R4061O	R4061O ELIGIBILITY INTERVIEWER, GOVT PRG						5,592
34300 P634 1000000000			55	55	18.720	\$39,237		Presbyterian - HMO		
	9/28/2012 113261		A			\$0		PRESHA1		
003		1.00 1	R4061A	R4061A ELIGIBILITY INTERVIEWER, GOVT PRG						5,592
34300 P634 1000000000			IF	IF	38.774	\$81,270		None		
	7/28/2012 301937		A			\$0		NoneCN		
003		1.00 1	IDAD26	IDAD26 IT APPLICATION DEVELOPER III						0
34300 P634 1000000000			65	65	24.684	\$51,738		Presbyterian - HMO		
	8/14/2012 317684		A			\$0		PRESHB3		
003		1.00 1	C2011A	C2011A ACCOUNTANT & AUDITOR-A						8,923
34300 P634 1000000000	Neil Kueffer		28	28	47.459	\$99,474		Presbyterian - HMO		
10101860	1/1/2013		A			\$0		PRESHC2		
001		1.00 1	007225	007225 Deputy Agency Director I						9,314
34300 P634 1000000000			55	55	19.842	\$41,589		None		
	7/27/2012 316568		A			\$0		NoneAN		
003		1.00 1	R4061A	R4061A ELIGIBILITY INTERVIEWER, GOVT PRG						0
34300 P634 1000000000			IF	IF	36.067	\$75,596		Presbyterian - HMO		
	4/11/2013 334564		A			\$0		PRESHC1		
003		1.00 1	IDAD26	IDAD26 IT APPLICATION DEVELOPER III						4,207
34300 P634 1000000000			55	55	18.658	\$39,107		BC/BS - HMO		
	10/8/2012 327998					\$0		BCBSHA1		
003		1.00 1	R4061A	R4061A ELIGIBILITY INTERVIEWER, GOVT PRG						5,592

Budget Review System

E-1 Personnel Listing

Program Support

BU PCode Department

34300 P634 1000000000

Org Structure		Employee Name		Employee	Position	Proj Hourly	Projected	RTW	Ins Carrier	Ins Prem
Position No.	Annv Date	Employee No.		Grade	Status		Annual Salary		Ins Range	
LineCode		FTE	PayPlan		Spec		Over 128400			
Totals:	001	\$287,079	Total FTE:	Perm:	26.00		Total Projected Salary		\$1,459,558	
	002	\$0		Term:	0.00		Total Over 128400		\$5,220	
	003	\$1,172,479		Temp:	0.00		Total Insur. Premium		\$192,925	
	004	\$0								
	005	\$0								

**BUDGET REVIEW SYSTEM
E-1B VACANCY RATE WORKSHEET**

Program Support

Budget Code: 34300 P634 0000000000 000000

Updates complete. Click below to return to BRS.

(Budgeted Positions Only)			
Estimated Personnel Costs	FY19 OpBud	Calculations from E Forms	
		----- FY20 -----	
Personal Services, Form E-1:			
520100- 520500 Exempt Perm, Term, Perm/FT, Perm/PT, Temporary	1,402.1	1,459.6	1,459.6
Employee Benefits, Forms E-3 and E-3a:			
521100 Group Health Insurance	199.7	192.9	192.9
521200 Retirement	231.9	245.6	245.6
521300 FICA	107.4	111.3	111.3
521700 Retiree Health Care	27.9	29.2	29.2
Total Estimated Personnel Costs	1,969.0	2,038.6	2,038.6
	FY19	FY20	FY20
	OpBud	OpBud	Recomm
Personal Services from S-8/S-9 (accounts 520100 to 521900)	1,937.5	2,053.0	
Less Amounts in non-salary items (accounts 520600-520900)	0.0	0.0	
Less fixed costs			
521400 Workers' Compensation	0.2	0.2	
521401 GSD Workers' Compensation Premium	1.6	1.6	
521500 Unemployment Compensation	0.0	0.0	
521600 Liability Insurance	9.3	9.0	
521900 Other Employee Benefits	0.0	0.0	
Subtotal of accounts 520600 to 521900	11.1	10.8	0.0
Adjusted Amount (Personal Services less non-salary accounts and fixed costs)	1,926.4	2,042.2	0.0
Request/Recomm (Over)/Under Operating Budget	42.6	-3.6	2,038.6
Budgeted Vacancy Rate	2.2%	-0.2%	0.0%

**OTHER FISCAL YEARS
(Budgeted Positions Only)**

	Positions (From S-8 FTE)	Vacant Positions (See Data Entry)	Vacancy Rate
FY19 Actual Average Vacancy Rate, Current Month (April, 2019)	27.00	3.00	11.1%
FY19 Actual Average Vacancy Rate, Year-to Date Basis (Average for FY19)	27.00	2.70	10.0%
FY18 Actual Average Vacancy Rate, Annual Basis (Average for FY18)	27.00	2.25	8.3%

Budget Review System E-3 Summary by Line Codes

Program Support

BU PCode Department ReportCatg

34300 P634 1000000000000000

Line Code

012 Retirement	PERA	25	ERA	0	Judicial Retirement	0
	Salaries	\$1,424,538	Salaries	\$0	Salaries	\$0
	Rate	0.1724	Rate	0.0000	Rate	0.0000
	Total	\$245,590	Total	\$0	Total	\$0
	Correctional Officers	0	State Police Officers	0	Magistrate Retirement	0
	Salaries	\$0	Salaries	\$0	Salaries	\$0
	Rate	0.0000	Rate	0.0000	Rate	0.0000
	Total	\$0	Total	\$0	Total	\$0

Total Retirement	\$245,590
-------------------------	------------------

013 FICA	Total Salaries	\$1,459,558		\$5,220
	Amount over FICA limit	\$5,220	Med Tax for Amt over FICA Limit or Corr. Off.	\$0
	FICA salaries	\$1,454,338		
	FICA rate	0.0765	0.0145	
	Total FICA	\$111,257	\$76	

Total FICA	\$111,333
-------------------	------------------

017 Retiree Health Care	Total Annual Salaries	\$1,459,558	
	Employer Share	0.02000	
	Retiree Health Care	\$29,191	

Total Retiree Health Care	\$29,191
----------------------------------	-----------------

**Budget Review System
Form E-3A**

Program Support

BU PCode Department ReportCatg

34300 P634 1000000000000000

011 Health Insurance

Presbyterian - HMO

Salary Range	Single Coverage			Employee + Spouse			Employee + Child(ren)			Family Coverage		
	# of Empl	Premium (State)		# of Empl	Premium (State)		# of Empl	Premium (State)		# of Empl	Premium (State)	
< \$50K	9.00	5,592 =	50,328	2.00	12,375 =	24,750	0.00	0 =	0	1.00	16,372 =	16,372
\$50-60	1.00	4,899 =	4,899	0.00	0 =	0	1.00	8,923 =	8,923	2.00	14,333 =	28,666
>= \$60K	1.00	4,207 =	4,207	1.00	9,314 =	9,314	1.00	7,656 =	7,656	1.00	12,293 =	12,293

Total Presbyterian - HMO \$167,408

Blue Cross/Blue Shield - HMO

Salary Range	Single Coverage			Employee + Spouse			Employee + Child(ren)			Family Coverage		
	# of Empl	Premium (State)		# of Empl	Premium (State)		# of Empl	Premium (State)		# of Empl	Premium (State)	
< \$50K	2.00	5,592 =	11,184	0.00	0 =	0	0.00	0 =	0	0.00	0 =	0
\$50-60	0.00	0 =	0	0.00	0 =	0	0.00	0 =	0	1.00	14,333 =	14,333
>= \$60K	0.00	0 =	0	0.00	0 =	0	0.00	0 =	0	0.00	0 =	0

Total BCBS - HMO \$25,517

**Budget Review System
Form E-3A**

Program Support

BU PCode Department ReportCatg

34300 P634 1000000000000000

Blue Cross/Blue Shield - PPO

Salary Range	Single Coverage			Employee + Spouse			Employee + Child(ren)			Family Coverage		
	# of Empl	Premium (State)		# of Empl	Premium (State)		# of Empl	Premium (State)		# of Empl	Premium (State)	
< \$50K	0.00	0 =	0	0.00	0 =	0	0.00	0 =	0	0.00	0 =	0
\$50-60	0.00	0 =	0	0.00	0 =	0	0.00	0 =	0	0.00	0 =	0
>= \$60K	0.00	0 =	0	0.00	0 =	0	0.00	0 =	0	0.00	0 =	0

Total BCBS - PPO	\$0
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Grand Total Group Health Insurance	\$192,925
---	------------------

OPERATING BUDGET FY2020
OPBUD-2 to OPBUD-3 and to TOOL
FTE RECONCILIATION

Agency Name: New Mexico Retiree Health Care Authority

Business Unit: 34300
Program Code: P634

Position Number	Position Title	OPBUD-2	OPBUD-3	TOOL	
00021745	Eligibility Interviewer, Gov't PR	1.0	1.0	1.0	
00021746	Chief Financial Officer II	1.0	1.0	1.0	
00021747	Actuary I	1.0	1.0	1.0	
00021748	Administrative Assistant I	1.0	1.0	1.0	
00021749	Eligibility Interviewer, Gov't PR	1.0	1.0	1.0	
00021750	Financial Specialist A	1.0	1.0	1.0	
00022395	IT Network Administrator I	1.0	1.0	1.0	
00023554	IT Technology Officer	1.0	1.0	1.0	
00027827	Executive Director	1.0	1.0	1.0	
00029707	Eligibility Interviewer, Gov't PR	1.0	1.0	1.0	
00050526	Eligibility Interviewer, Gov't PR	1.0	1.0	1.0	
00050527	Eligibility Interviewer, Gov't PR	1.0	1.0	1.0	
00051164	Eligibility Interviewer, Gov't PR	1.0	1.0	1.0	
00051165	Eligibility Interviewer, Gov't PR	1.0	1.0	1.0	
00051581	HR Training & Labor Relations Spec A	-	-	-	Removed FY20
00051992	Business Operations Specialist O	1.0	1.0	1.0	
00059439	Eligibility Interviewer, Gov't PR	1.0	1.0	1.0	
00070611	Eligibility Interviewer, Gov't PR	1.0	1.0	1.0	
00080177	Business Operations Specialist A	1.0	1.0	1.0	
10101133	Eligibility Interviewer, Gov't PR	1.0	1.0	1.0	
10101135	Eligibility Interviewer, Gov't PR	1.0	1.0	1.0	
10101137	IT Application Developer III	1.0	1.0	1.0	
10101853	Accountant & Auditor A	1.0	1.0	1.0	
10101860	Deputy Director	1.0	1.0	1.0	
10105273	Eligibility Interviewer, Gov't PR	1.0	1.0	1.0	
10108869	IT Application Developer III	1.0	1.0	1.0	
10110009	Eligibility Interviewer, Gov't PR	1.0	1.0	1.0	
	TOTAL	26.0	26.0	26.0	

Codes: GF=General Fund OSF=Other State Funds IAT/ISF=Interagency Transfers and Internal Service Funds FF=Federal Funds

☐ Check Box if this form is a revision

Revision no: _____

Revision Date: _____

Page

State and Local Government Benefits Association

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WHEREAS, the State and Local Government Benefits Association has created the Certified Government Benefits Administrator program to recognize the achievement of Advanced training and experience in the administration of employee benefits in the public sector, and

WHEREAS, the Continuing Education Committee and Board of Directors of the Association have determined That the individual named herein has completed the educational and experiential requirements of said program.

THEREFORE, the State and Local Government Benefits Association, hereby confer upon



Neil Kueffer



The designation of

Certified Government Benefits Administrator

together with all honors, rights, and privileges pertaining thereto,

In Witness Whereof,
have set our hand this
9th Day of April 2019

Denise Chard

President, State and Local
Government Benefits Association

Lina Paulins

Executive Director, State & Local
Government Benefits Association

State and Local Government Benefits Association

60

WHEREAS, the State and Local Government Benefits Association has created the Certified Government Benefits Administrator program to recognize the achievement of Advanced training and experience in the administration of employee benefits in the public sector, and

WHEREAS, the Continuing Education Committee and Board of Directors of the Association have determined That the individual named herein has completed the educational and experiential requirements of said program.

THEREFORE, the State and Local Government Benefits Association, hereby confer upon



David Archuleta



The designation of

Certified Government Benefits Administrator

together with all honors, rights, and privileges pertaining thereto,

In Witness Whereof,

have set our hand this

9th Day of April 2019

Maria Chapel

President, State and Local

Government Benefits Association

Lina Beckling

Executive Director, State & Local

Government Benefits Association



NMRHCA

Quarterly Online Newsletter

April 2019

NMRHCA Initiates Communication Bridge With Its Active Employees

During the Fall of 2018, the New Mexico Retiree Health Care Authority (NMRHCA) initiated a rule change modifying the eligibility and years-of-service requirements to receive subsidies from NMRHCA. While the primary focus of our communications is directed toward retirees participating in the program, the rule-making process emphasized the need for improved communications between NMRHCA, employer groups and active employees.

With that said, NMRHCA will circulate a quarterly newsletter by email that contains helpful updates and information as active employees begin to prepare for retirement. This newsletter will be posted under the employer section of our website: www.nmrhca.org.

BACKGROUND. Created in 1990, NMRHCA provides access to affordable health insurance for certain employees retiring from public service. NMRHCA is governed by an 11-member board of directors that broadly represents a mixture of active and retired public employees. NMRHCA currently represents 302 employee groups, including all school districts, charter schools, several universities, state agencies and the majority of local government organizations (cities, counties and municipalities).

NMRHCA also provides access to comprehensive medical, pharmacy, dental, vision and life insurance coverage for over 63,500 retiree and eligible dependents. If you are receiving this newsletter from your employer, it is likely that you are contributing (through payroll deduction) to NMRHCA and expect to have access to the benefits we provide upon retirement. These benefits, while not guaranteed, are a form of deferred compensation and provide an important recruitment and retention tool for employers.

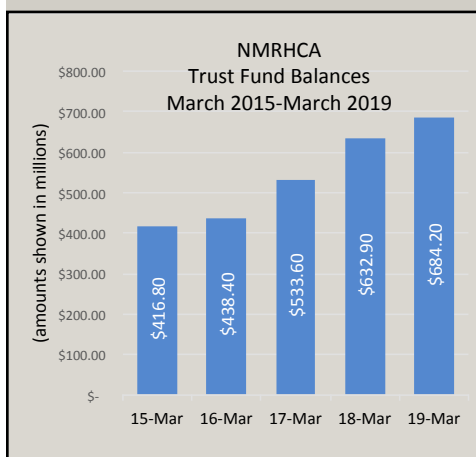
CURRENT STATUS. NMRHCA is facing significant long-term financial challenges. As of June 30, 2018, NMRHCA reported a solvency period through fiscal year 2037 (18 years), at which time expenditures are expected to exceed revenues and our trust fund will be completely exhausted. In addition, the rules associated with Governmental Accounting Standards Board (GASB) Statements 74 and 75, require NMRHCA to measure all outstanding liabilities and compare them to existing trust fund balances and projected revenues.

This measurement as of June 30, 2018 indicates that total liabilities exceed \$5 billion over the next 30 years, compared to the \$650 million trust fund balances yield a 13 percent funded ratio. While these numbers may seem startling, it is important to put things in perspective and make folks aware of changes they can expect, as the program evolves to accommodate the limited resources available to support the benefits offered to existing and future retirees.

STRATEGIC PLAN. In October 2017, the Board of Directors adopted a second iteration of its 5-Year Strategic Plan to include cost containment, liability limiting and revenue enhancements in order to continue addressing the long-term challenges facing the program. The Board of Directors remains committed to ensuring access to affordable health insurance coverages for existing and future plan participants.

The Board is also committed to making sure that retirees, employees, and employer groups are informed about changes to the program that may have a significant bearing or impact on their retirement plans.

The New Mexico Retiree Health Care Authority fosters quality of life and peace of mind by responsibly administering affordable, secure health care benefits for public retirees and their families.



Medicare Seminars

The New Mexico Retiree Health Care Authority holds monthly seminars for retirees and active employees aging into Medicare. The meetings take place in our Albuquerque office (4308 Carlisle Blvd. NE, Suite 207) and our Santa Fe office (PERA Building Training Room, 33 Plaza La Prensa, Santa Fe), except as noted. The following is the schedule for 2019:

May 15: Albuquerque, 9:30 a.m.

May 16: Farmington Civic Center Conference Room A, 10:30 a.m.

June 12: Albuquerque, 9:30 a.m.
Santa Fe, 1:30 p.m.

July 17: Albuquerque, 9:30 a.m.

August 14: Albuquerque, 9:30 a.m.
Santa Fe, 1:30 p.m.

September 11: Albuquerque, 9:30 a.m.

December 11: Albuquerque, 9:30 a.m.
Santa Fe, 1:30 p.m.

Important Links:

New Mexico Retiree Health Care Authority:
www.nmrhca.org

New Mexico Educational Retirement Board:
www.nmerb.org

Public Education Retirement Association:
www.nmpera.org

Retiring Soon and Wondering About NMRHCA Health Insurance?

Frequently Asked Questions

Q: Am I eligible?

A: If you receive a disability or normal retirement benefit from public service in New Mexico with an NMRHCA participating employer and you made contributions to NMRHCA for at least five years before your retirement date.

Q: Can I insure my family?

A: Eligible dependents include a spouse or domestic partner (proper documentation may be required), a dependent child under the age of 26 or a dependent child over 26 who is wholly dependent on the retiree, with the disability having occurred before the limiting age. Dependents of Pre-Medicare retirees must be enrolled in the same plan as the retiree.

Q: When do I enroll in NMRHCA?

A: Once you have established your retirement date with PERA or ERB, contact NMRHCA, and we will send you an application form. It is best to submit your application at least one month but not to exceed 60 days before your retirement date. You must enroll within 31 days of your last day of current medical coverage or your retirement date, whichever is later. If you do not enroll within that time frame, you cannot enroll until the next Open Enrollment period, which is every odd-numbered year (2021, 2023, 2025 ...).

Q: What if I wish to be covered under a spouse's insurance?

A: You can delay enrolling in NMRH-

CA until your spouse's insurance ends. You must enroll within 31 days of your spouse's loss of coverage.

Q: What if I return to work?

A: If your new employer offers health insurance, you are required to take that employer's coverage. When that employment ends, you must re-enroll with NMRHCA within 31 days from your last day of coverage, or you will have to wait until the next Open Enrollment period.

If you go back to work for a PERA or ERB entity, please check with those entities about how your retirement may be affected. If your return to work changes your previous retirement date with PERA or ERB to 2021 or later, you will be subject to NMRHCA's rule changes (of an age minimum requirement of 55 and increasing the years of service to get the maximum subsidy from 20 to 25 years).

Please contact NMRHCA if you have questions about the rule changes that are taking effect on Jan. 1, 2021.

Q: How do I cancel coverage?

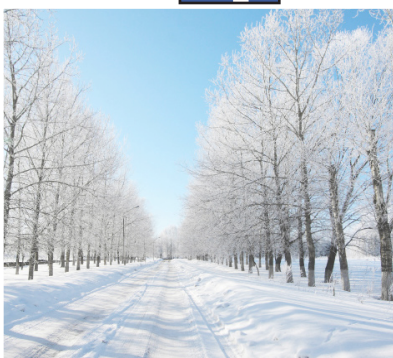
A: You must submit written notice to NMRHCA. Cancellation will take effect on the first day of the month following receipt of notification by NMRHCA. Effective date of cancellation is not retroactive.

Q: How much do I have to pay upon signing up?

A: NMRHCA requires payment for two months of premiums up front.



Find us on Facebook: <https://www.facebook.com/nmrhca>



HEALTH PLAN CONTACT INFORMATION

Blue Cross Blue Shield

BCBSNM 800-788-1792
BCBSNM Medicare Advantage 877-299-1008
www.bcbsnm.com

Presbyterian Health Plan

Presbyterian Health Plan 888-275-7737
Presbyterian Medicare Advantage .800-797-5343
www.phs.org

Express Scripts

Express Scripts Medicare 800-551-1866
Express Scripts Non-Medicare .. 800-501-0987
www.express-scripts.com

Humana 866-396-8810
<https://our.humana.com/nmrhca>

UnitedHealthcare 866-622-8014
www.uhcretiree.com

United Concordia 888-898-0370
www.ucci.com

Delta Dental 877-395-9420
www.deltadentalnm.com

Davis Vision 800-999-5431
www.davisvision.com

Standard Insurance 888-609-9763
www.standard.com/mybenefits/newmexico_rhca

NMRHCA CONTACT INFORMATION

4308 Carlisle Blvd NE, Suite 104
Albuquerque, NM 87107-4849

33 Plaza La Prensa
Santa Fe, NM 87507

800-233-2576 (Toll Free)
505-476-7540 (Santa Fe)
505-884-8611 (Fax)
Email: customerservice@state.nm.us

Hours: 8 a.m.-5 p.m. Monday-Friday

Please visit us online at www.nmrhca.org

RHCA life insurance holders: Look for a letter in the mail about rate changes upcoming in July



your Benefit Messenger

NMRHCA 2019 Newsletter Vol. 4 ~ Spring Edition

NMRHCA KICKS OFF SUMMER WITH OUR FIRST WELLNESS EVENT

Summer will be here and the time will be right to dance on over to the New Mexico Retiree Health Care Authority's first Wise and Well Event!

In conjunction with health plan partners Blue Cross Blue Shield, Humana, Presbyterian and United-Healthcare, NMRHCA will host the wellness extravaganza on June 21, the first day of summer.

The event will feature a pair of keynote speakers on wellness and multiple breakout sessions on various wellness topics, including SilverSneakers, weight management, healthy eating and fall prevention.

If you go. ...

NMRHCA Wise and Well Event

LOCATION: Smith-Brasher Hall at CNM, 717 University Blvd. SE, Albuquerque

DATE: June 21

TIME: 9:30 a.m.-12:30 p.m. (Doors open at 8:30 a.m.)

Free admission/free parking

We will also have tables available for members to fill out personal health assessments, get their blood pressure checked, have access to other screenings and be able to talk one-on-one with their health providers

about their wellness or any other questions they may have about their plans.

Best of all — for each breakout session you attend, or if you complete a personal health assessment, you will receive credit for an activity toward the NMRHCA Wise and Well Incentive Program that rewards members who participate in two structured wellness activities with a \$50 Visa gift card.

We will have wellness completion forms available on site, as well as several structured activities that will count toward the incentive program.

See *First* on Page 2

EXECUTIVE DIRECTOR'S UPDATE: 2019 LEGISLATIVE REVIEW, UPCOMING PLANS

Back in January, we provided an update regarding our proposed legislation (House Bill 95), sponsored by Representative Tomás Salazar and Senator Liz Stefanics. HB 95 sought to increase employee and employer contributions to the program for purposes of increasing our funded ratio and extending solvency.

Despite an exhaustive effort by our sponsors, HB 95 failed to move through its committee assignments and died in the House Appropriations Committee. Unfortunately, this was the fifth unsuccessful attempt to boost employee and employer contributions since 2013, the results of which will require the Board to make some difficult decisions with regard to the future direction of this program in the next couple of years.

On to a more positive subject — unless you suffer from allergies, it's hard not to appreciate the longer days and warmer weather that accompany each spring, especially after a winter that provided above average levels of moisture across most of New Mexico.

While it seems like just yesterday we were writing to encourage everyone to develop and stick to their fitness goals for the New Year, we are now marching toward the summer season, which I hope provides you with plenty of opportunity to spend time outdoors with friends and family in pursuit of your health and fitness goals.

Also as the summer approaches, we have begun evaluating our claims costs, medical trend and participation

See *EXECUTIVE DIRECTOR'S* on Page 2





FIRST NMRHCA WISE AND WELL FAIR IS ON JUNE 21

Continued from Page 1

And, like our Switch Enrollment meetings in October, we and our health partners will have wellness giveaways for our attendees. Healthy snacks and beverages also will be available.

Please plan on attending the Wise and Well event to learn more ways to maintain and improve your health. You literally will feel better that you did!

For more information on the event, call 505-222-6403.

EXECUTIVE DIRECTOR'S UPDATE: BUSY SUMMER AHEAD

Continued from Page 1

for purposes of making plan recommendations to the Board of Directors related to the 2020 calendar year. Health insurance costs continue to outpace general inflation; continuous evaluation and modification of our plans to accommodate changing economic factors, including limited growth in revenues, are required.

As in prior years, this process will seek to balance the cost sharing arrangements between the plan and retirees, minimize disruption and ensure that we meet our financial obligations for current and future plan participants.

In addition, NMRHCA staff is developing a request for proposal (RFP) for benefit and consulting services related to the upcoming procurement of medical, dental, vision and Medicare services. That RFP will be issued this fall.

This procurement is one of the most

important functions NMRHCA staff performs, as the selection of well-qualified health plan partners is paramount to our ability to contain costs and serve our members.

The results of this procurement will be available next spring, and announcements will be made in advance of any changes that may affect our members.

Lastly, our fall newsletter will be mailed in September and will include a chart showing the dates, times and locations of our switch enrollment meetings beginning October 2 in Santa Fe and concluding November 1 in Rio Rancho.

We hope that you can join us for one of our monthly Medicare Outreach meetings where you can find out more about Medicare and the supporting plans that we offer.

I hope you all have a great summer.

— David Archuleta
Executive Director

BRACE YOURSELVES: SCAM OFFERS FITTED DEVICES TO MEMBERS FOR 'FREE'

New Mexico Retiree Health Care Authority members should be aware of a telephone and online scam/fraud offering "free" durable medical equipment supplies in the form of braces.

The scammers may call or reach out online, identifying themselves as a representative from Medicare or a vendor under your plan for Durable Medical Equipment. These solicitors will ask you to confirm your social security number, Medicare ID or Medical plan number and then ask whether you have any pain.

The scammers will then offer to send you braces — usually knee, back or shoulder braces — for free. Regardless of whether you accept the offer, the scammers will obtain your address and send the aforementioned braces, supplies, etc.

While you, as the brace recipient, may or may not be required to pay anything for these braces, NMRHCA plans can be affected in the long run because we also could be billed for items that are not needed nor requested by your local provider. This ultimately can affect the rates you are paying for medical coverage.

Remember, your physician is the only one with whom you should consult about use of medical equipment or topical creams. If you do receive unsolicited offers, please call 1-800-MEDICARE (1-800-633-4227) if you are a BCBSNM Medicare Supplement member, or the Office of the Inspector General, 1-800-HHS-TIPS (1-800-447-8477) or the BCBSNM Special Investigations Department at 1-800-543-0867.

NMRHCA AT A GLANCE

MEDICARE SEMINARS IN 2019 INCLUDE FARMINGTON IN MAY

To help our Medicare retirees manage their health care, NMRHCA will continue its Medicare Informational Sessions in 2019.

Sessions will be held at our offices in Albuquerque (9:30 a.m.) and Santa Fe (1:30 p.m.) on the following days:

- May 15 (Albuquerque only)
- June 12 (ABQ and SF)
- July 17 (ABQ Only)
- August 14 (ABQ and SF)
- September 11 (ABQ Only)
- December 11 (ABQ and SF)

NMRHCA also will host a session in Farmington on May 16 at the Civic Center at 10:30 a.m.

NEED BOOST IN WISE AND WELL PROGRAM PARTICIPATION!!!

As of March 31, 2019, only 51 members have earned a \$50 Visa gift card for participating in our Wise and Well Incentive Program by engaging in two structured wellness activities and turning in a completion form.

Last year, we had 46 recipients as of March on the way to a yearly total of 287.

However, in 2017, we had 133 cards distributed toward an annual total of 400. With over 54,000 eligible members that can participate, we can do a lot better! Go to the Wellness tab of our website, NMRHCA.org to download a completion form.

WELLNESS QUIZ

HOW MUCH DO YOU KNOW ABOUT EXERCISE?

1. Aerobic exercise is the fastest way for seniors to lose weight.

True
False

2. Weight lifting isn't safe or effective for people in their 80s and 90s.

True
False

3. Which exercise will NOT help build bone and prevent fractures?

- a. Swimming
- b. Weight lifting
- c. Tennis
- d. Walking
- e. Bicycling

4. Which activity can cut your risk of heart disease roughly in half?

- a. Regular walks
- b. Jogging
- c. Aerobics classes
- d. All of the above
- e. None of the above

5. Aerobic exercise can be just as effective as medications for treating severe depression in seniors.

True
False

6. Which disease usually makes it impossible to engage in vigorous exercise?

- a. Arthritis
- b. Diabetes
- c. High blood pressure
- d. All of the above
- e. None of the above

ANSWERS

1. False. Most seniors lose weight faster through strength training than through aerobic exercise, according to a report in Medicine and Science in Sports and Exercise. Lifting weights helps replace fat with muscle and speeds up metabolism. After a few weeks of strength training, the study found, most subjects need to increase calories by 15 percent just to maintain body weight. But because muscle is denser than fat,

your weight may stay the same or increase slightly as you gain muscle mass and burn fat.

2. False. A group of nursing home residents ranging in age from 87 to 96 improved their muscle strength by almost 180 percent after just eight weeks of resistance training. In general, frail elderly people find that their balance improves, their pace quickens and stairs become less challenging after they begin age-appropriate strength training. Be aware that any exercise program for seniors takes into account that they are more prone to bone fractures, tendinitis and muscle strains.

3. a. Swimming. Swimming and biking are excellent for a workout, but they don't build bone. To ward off osteoporosis and prevent fractures, you need exercises in which you stay on your feet and support your own weight. Walking, jogging, dancing, tennis and weight lifting are all good choices for maintaining healthy bones.

4. d. All of the above. You don't need to push yourself to the limit to improve your odds against heart ailments. Researchers at Harvard found that women who walked just three hours a week cut their risk of heart disease by 40 percent, equivalent to the benefits of much more vigorous exercise.

5. True. In a study of 156 severely depressed men and women over 50, Duke University researchers found that 16 weeks of aerobic exercise eased symptoms as thoroughly as a 16-week regimen of antidepressant drugs. People who are depressed should consult with their doctor to determine the best treatment and what part exercise can play.

6. e. None of the above. Regular exercise can be excellent therapy for all of these diseases — and many others. Check with your doctor before starting any high-intensity exercise program.

— Source: HealthDay

Wise and Well Health Fair

Event schedule includes:

- **Keynote presentations on the Happiness Effect and Enhancing Cognitive Health at Any Age**
- **Breakout sessions on falls prevention, SilverSneakers, weight management, dental care**
- **Blood pressure monitoring, diabetes education, personal health assessments**
- **Giveaways, door prizes and more!**

June 21
Smith Brasher Hall
CNM Main Campus

717 University Blvd. SE
9:30 a.m.-1 p.m.
Doors open at 8:30 a.m.



The Retiree Health Care Authority, Blue Cross Blue Shield of New Mexico, Humana, Presbyterian Health Plan and UnitedHealthcare have joined forces to promote the NMRHCA Wise and Well program with this live event for our retirees.

Call NMRHCA at 1-800-672-233-2576
for more information

NMRHCA Wise and Well Event

Door prizes include:

- Albuquerque Isotopes tickets
- UNM football tickets
- Fold-out camping chair
- Fitbit watch

Plan on attending for your chance to pick up some free stuff while learning how to better manage your health!

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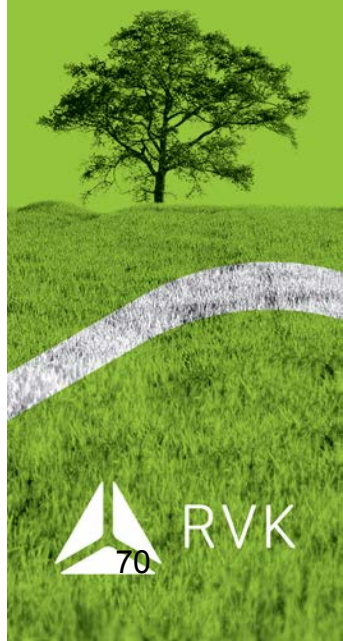
New Mexico State Investment Council

Investment Performance Analysis

Period Ended: December 31, 2018



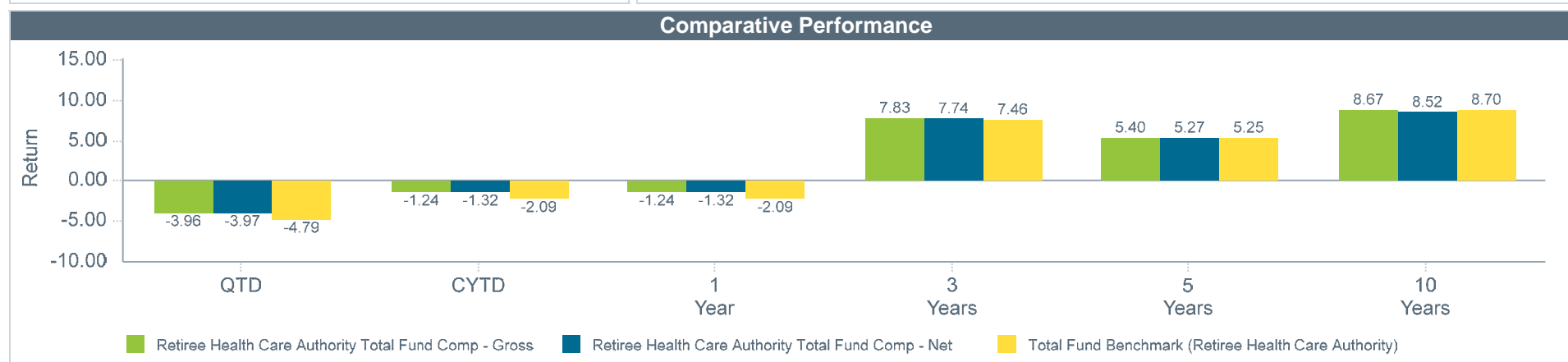
Retiree Health Care Authority



New Mexico State Investment Council
Retiree Health Care Authority Total Fund Comp

As of December 31, 2018

Overview	Asset Allocation vs. Target Allocation				
The New Mexico Retiree Health Care Authority (NMRHCA) was established in 1990 to provide health care coverage to retirees of state agencies and eligible participating public entities. Approximately 300 public entities including cities, counties, universities and charter schools participate in NMRHCA. The agency provides medical plans for both non Medicare and Medicare eligible retirees and their dependents as well as dental, vision and life insurance. The Authority currently provides coverage to approximately 58,000 retirees and their dependents.		Market Value (\$)	Allocation (%)	Target (%)	Difference (%)
	Large Cap US Equity Index	80,016,419	12.57	14.00	-1.43
	Small/Mid Cap US Equity Active	10,609,250	1.67	2.00	-0.33
	Non-US Developed Markets Index	80,249,749	12.61	14.00	-1.39
	Non-US Emerging Markets Index	60,878,692	9.57	10.00	-0.43
	US Core Bonds	134,583,069	21.15	20.00	1.15
	Credit & Structured Finance	99,229,430	15.59	15.00	0.59
	Private Equity	71,873,713	11.29	10.00	1.29
	Real Estate	67,362,555	10.59	10.00	0.59
	Real Return	31,560,425	4.96	5.00	-0.04
	Total Fund	636,363,301	100.00	100.00	0.00

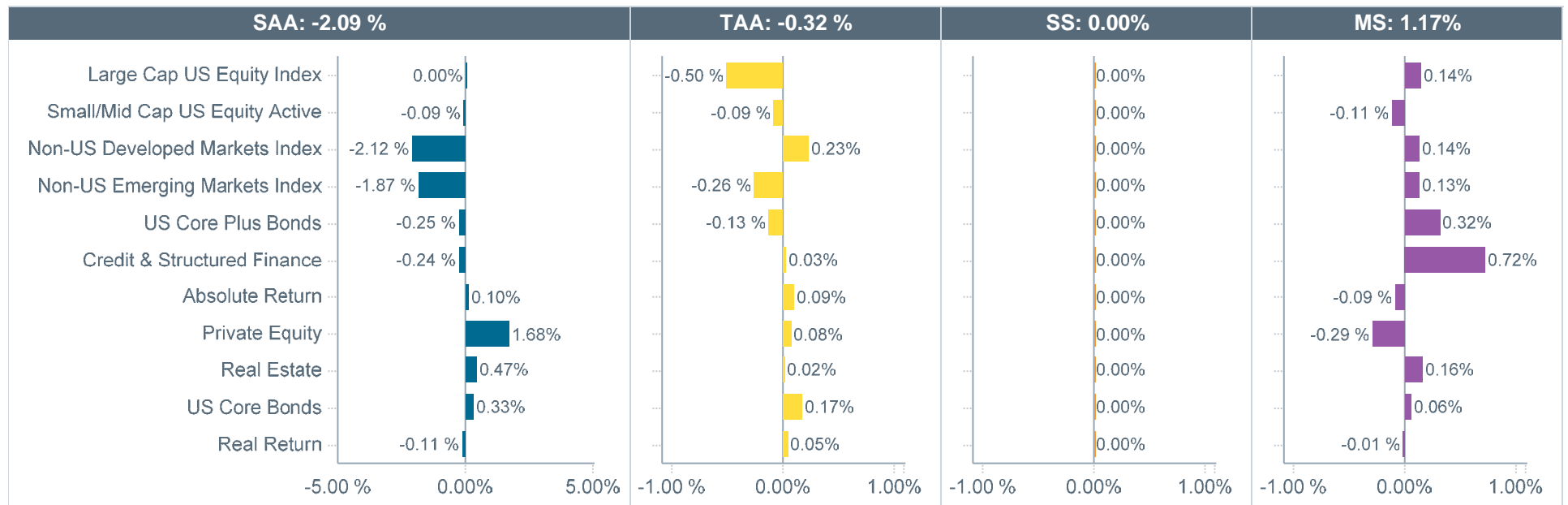
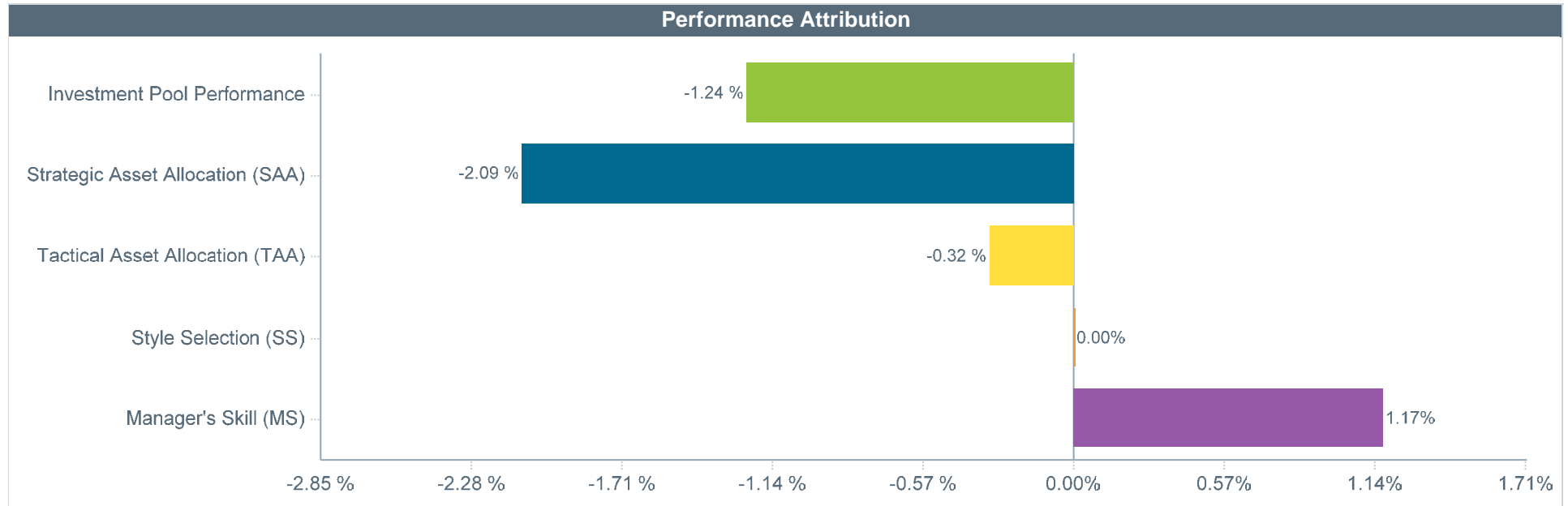


Comparative Performance									
	QTD	CYTD	1 Year	3 Years	5 Years	10 Years	2017	2016	2015
Retiree Health Care Authority Total Fund Comp - Gross	-3.96	-1.24	-1.24	7.83	5.40	8.67	17.44	8.09	-0.90
Total Fund Benchmark (Retiree Health Care Authority)	-4.79	-2.09	-2.09	7.46	5.25	8.70	16.87	8.43	-0.76
Difference	0.83	0.85	0.85	0.37	0.15	-0.03	0.57	-0.34	-0.14
Retiree Health Care Authority Total Fund Comp - Net	-3.97	-1.32	-1.32	7.74	5.27	8.52	17.35	7.99	-1.03
Total Fund Benchmark (Retiree Health Care Authority)	-4.79	-2.09	-2.09	7.46	5.25	8.70	16.87	8.43	-0.76
Difference	0.82	0.77	0.77	0.28	0.02	-0.18	0.48	-0.44	-0.27

Schedule of Investable Assets					
Periods Ending	Beginning Market Value (\$)	Net Cash Flow (\$)	Gain/Loss (\$)	Ending Market Value (\$)	% Return
CYTD	621,163,690	24,000,717	-8,801,106	636,363,301	-1.32

Allocations shown may not sum up to 100% exactly due to rounding. Performance shown is net of fees, except where noted otherwise.





Performance shown is gross of fees. Calculation is based on monthly periodicity. See Glossary for additional information regarding the Total Fund Attribution - IDP calculation.

New Mexico State Investment Council
Asset Allocation & Performance - Composites & Managers

As of December 31, 2018

	Allocation		Performance (%)										
	Market Value (\$)	%	QTD	FYTD	CYTD	1 Year	3 Years	5 Years	10 Years	2017	2016	Since Incep.	Inception Date
NMSIC Total Fund Composite	23,241,124,893	100.00	-5.74	-3.03	-1.54	-1.54	6.83	5.49	8.86	15.07	7.60	5.08	01/01/2000
US Equity Composite	5,531,671,704	23.80	-13.55	-7.91	-5.57	-5.57	8.63	7.43	13.41	21.20	12.02	5.86	05/01/1999
<i>Russell 3000 Index</i>			<i>-14.30</i>	<i>-8.20</i>	<i>-5.24</i>	<i>-5.24</i>	<i>8.97</i>	<i>7.91</i>	<i>13.18</i>	<i>21.13</i>	<i>12.74</i>	<i>5.65</i>	
US Large Cap Equity Composite	5,059,087,053	21.77	-13.23	-7.16	-4.71	-4.71	8.88	8.02	13.64	22.08	10.96	5.46	05/01/1999
<i>Russell 1000 Index</i>			<i>-13.82</i>	<i>-7.42</i>	<i>-4.78</i>	<i>-4.78</i>	<i>9.09</i>	<i>8.21</i>	<i>13.28</i>	<i>21.69</i>	<i>12.05</i>	<i>5.52</i>	
<i>IM U.S. Large Cap Equity (SA+CF)</i>			<i>-13.94</i>	<i>-7.92</i>	<i>-5.15</i>	<i>-5.15</i>	<i>8.62</i>	<i>7.99</i>	<i>13.12</i>	<i>21.68</i>	<i>10.98</i>	<i>6.45</i>	
Brown Brothers Harriman	461,749,146	1.99	-9.95	-4.31	-6.08	-6.08	7.19	5.77	N/A	20.27	9.03	10.80	06/01/2012
<i>Russell 1000 Index</i>			<i>-13.82</i>	<i>-7.42</i>	<i>-4.78</i>	<i>-4.78</i>	<i>9.09</i>	<i>8.21</i>	<i>13.28</i>	<i>21.69</i>	<i>12.05</i>	<i>12.59</i>	
<i>IM U.S. Large Cap Core Equity (SA+CF)</i>			<i>-13.83</i>	<i>-7.66</i>	<i>-5.20</i>	<i>-5.20</i>	<i>8.47</i>	<i>8.15</i>	<i>13.05</i>	<i>21.83</i>	<i>10.52</i>	<i>12.62</i>	
T. Rowe Price LC Growth	619,518,480	2.67	-12.83	-6.75	4.80	4.80	14.61	12.74	N/A	38.95	3.40	17.47	06/01/2012
<i>Russell 1000 Grth Index</i>			<i>-15.89</i>	<i>-8.17</i>	<i>-1.51</i>	<i>-1.51</i>	<i>11.15</i>	<i>10.40</i>	<i>15.29</i>	<i>30.21</i>	<i>7.08</i>	<i>13.89</i>	
<i>IM U.S. Large Cap Growth Equity (SA+CF)</i>			<i>-15.14</i>	<i>-8.38</i>	<i>-1.17</i>	<i>-1.17</i>	<i>10.19</i>	<i>9.66</i>	<i>14.90</i>	<i>28.11</i>	<i>4.65</i>	<i>13.57</i>	
AQR US SPLO	1,043,657,170	4.49	-14.39	-8.16	-6.99	-6.99	N/A	N/A	N/A	N/A	N/A	1.65	08/01/2017
<i>Russell 1000 Index</i>			<i>-13.82</i>	<i>-7.42</i>	<i>-4.78</i>	<i>-4.78</i>	<i>9.09</i>	<i>8.21</i>	<i>13.28</i>	<i>21.69</i>	<i>12.05</i>	<i>2.79</i>	
NT SciBeta US HFE Index	768,769,802	3.31	-12.25	-6.75	-5.74	-5.74	N/A	N/A	N/A	N/A	N/A	0.84	08/01/2017
<i>Russell 1000 Index (0.85 Beta Adjusted)</i>			<i>-11.71</i>	<i>-6.09</i>	<i>-3.67</i>	<i>-3.67</i>	<i>7.93</i>	<i>7.12</i>	<i>11.39</i>	<i>18.34</i>	<i>10.29</i>	<i>2.73</i>	
NT Russell Fundamental LC Index Fund	508,550,033	2.19	-13.87	-7.91	-7.08	-7.08	8.36	N/A	N/A	17.33	16.69	6.61	02/01/2015
<i>Russell 1000 Val Index</i>			<i>-11.72</i>	<i>-6.69</i>	<i>-8.27</i>	<i>-8.27</i>	<i>6.95</i>	<i>5.95</i>	<i>11.18</i>	<i>13.66</i>	<i>17.34</i>	<i>5.33</i>	
NT Russell 1000 Index Fund	1,651,270,775	7.10	-13.87	-7.48	-4.86	-4.86	9.04	8.18	N/A	21.60	12.06	11.43	08/01/2011
<i>Russell 1000 Index</i>			<i>-13.82</i>	<i>-7.42</i>	<i>-4.78</i>	<i>-4.78</i>	<i>9.09</i>	<i>8.21</i>	<i>13.28</i>	<i>21.69</i>	<i>12.05</i>	<i>11.51</i>	
<i>IM U.S. Large Cap Core Equity (SA+CF)</i>			<i>-13.83</i>	<i>-7.66</i>	<i>-5.20</i>	<i>-5.20</i>	<i>8.47</i>	<i>8.15</i>	<i>13.05</i>	<i>21.83</i>	<i>10.52</i>	<i>11.43</i>	
US Small/Mid Cap Equity Composite	472,584,651	2.03	-16.70	-15.51	-14.07	-14.07	5.86	2.46	N/A	13.35	21.79	6.38	05/01/2011
<i>US Small/Mid Cap Equity Custom Index</i>			<i>-18.77</i>	<i>-15.52</i>	<i>-10.40</i>	<i>-10.40</i>	<i>7.31</i>	<i>5.01</i>	<i>12.63</i>	<i>15.84</i>	<i>19.06</i>	<i>7.87</i>	
<i>IM U.S. SMID Cap Equity (SA+CF)</i>			<i>-18.17</i>	<i>-13.94</i>	<i>-10.32</i>	<i>-10.32</i>	<i>7.50</i>	<i>5.40</i>	<i>13.85</i>	<i>17.83</i>	<i>16.37</i>	<i>8.44</i>	
Seizert Capital Partners	100,521,287	0.43	-14.51	-11.37	-9.77	-9.77	6.70	2.98	N/A	7.43	25.31	11.34	01/01/2012
<i>Russell Mid Cap Index</i>			<i>-15.37</i>	<i>-11.14</i>	<i>-9.06</i>	<i>-9.06</i>	<i>7.04</i>	<i>6.26</i>	<i>14.03</i>	<i>18.52</i>	<i>13.80</i>	<i>11.49</i>	
<i>IM U.S. Mid Cap Equity (SA+CF)</i>			<i>-16.66</i>	<i>-12.18</i>	<i>-9.26</i>	<i>-9.26</i>	<i>7.52</i>	<i>6.26</i>	<i>14.15</i>	<i>19.89</i>	<i>12.71</i>	<i>11.60</i>	
Donald Smith & Company	155,627,457	0.67	-13.12	-15.10	-19.64	-19.64	2.45	-0.14	N/A	17.54	13.87	6.72	01/01/2012
<i>Russell 2000 Val Index</i>			<i>-18.67</i>	<i>-17.36</i>	<i>-12.86</i>	<i>-12.86</i>	<i>7.37</i>	<i>3.61</i>	<i>10.40</i>	<i>7.84</i>	<i>31.74</i>	<i>9.57</i>	
<i>IM U.S. Small Cap Value Equity (SA+CF)</i>			<i>-19.21</i>	<i>-17.94</i>	<i>-14.36</i>	<i>-14.36</i>	<i>6.34</i>	<i>4.10</i>	<i>13.10</i>	<i>11.61</i>	<i>26.17</i>	<i>10.47</i>	
BlackRock Alpha Tilts	150,056,252	0.65	-20.05	-16.85	-8.92	-8.92	7.85	5.41	N/A	11.70	23.29	11.03	02/01/2012
<i>Russell 2000 Index</i>			<i>-20.20</i>	<i>-17.35</i>	<i>-11.01</i>	<i>-11.01</i>	<i>7.36</i>	<i>4.41</i>	<i>11.97</i>	<i>14.65</i>	<i>21.31</i>	<i>9.49</i>	
<i>IM U.S. Small Cap Core Equity (SA+CF)</i>			<i>-19.71</i>	<i>-16.55</i>	<i>-10.73</i>	<i>-10.73</i>	<i>7.73</i>	<i>5.48</i>	<i>13.56</i>	<i>15.18</i>	<i>20.77</i>	<i>10.60</i>	
NT S&P 600 Index Fund	65,724,876	0.28	-20.14	-16.45	-8.52	-8.52	N/A	N/A	N/A	N/A	N/A	2.72	06/01/2017
<i>S&P Sm Cap 600 Index (Cap Wtd)</i>			<i>-20.10</i>	<i>-16.34</i>	<i>-8.48</i>	<i>-8.48</i>	<i>9.46</i>	<i>6.34</i>	<i>13.61</i>	<i>13.23</i>	<i>26.56</i>	<i>2.40</i>	

Performance shown is gross of fees, except for Absolute Return, Private Equity, Real Estate, and Real Return investments, which are shown net of fees. Since Inception date shown represents the first full month following initial funding. Fiscal year ends June 30. For other performance-related comments, please see the Addendum. For additional information, please see the Glossary. *Indicates performance is lagged 1 quarter.

New Mexico State Investment Council
Asset Allocation & Performance - Composites & Managers

As of December 31, 2018

	Allocation		Performance (%)										
	Market Value (\$)	%	QTD	FYTD	CYTD	1 Year	3 Years	5 Years	10 Years	2017	2016	Since Incep.	Inception Date
Non-US Equity Composite	4,406,324,248	18.96	-12.30	-11.95	-14.71	-14.71	5.00	0.84	7.18	30.80	3.77	4.81	05/01/1999
<i>Non-US Equity Custom Index</i>			-11.88	-11.53	-14.76	-14.76	4.39	0.60	6.87	27.81	4.41	4.95	
Non-US Developed Markets Composite	3,536,412,572	15.22	-13.36	-12.44	-14.14	-14.14	4.32	1.70	6.97	29.02	2.48	3.96	05/01/1999
<i>Non-US Developed Markets Custom Index</i>			-13.06	-12.17	-14.40	-14.40	2.99	0.66	6.38	26.16	1.15	3.33	
<i>IM Int'l Equity Developed Markets (SA+CF)</i>			-13.73	-12.88	-14.96	-14.96	3.77	2.01	8.35	28.89	1.99	5.75	
LSV Int'l Large Cap Value	486,048,768	2.09	-12.75	-10.74	-15.45	-15.45	5.12	0.36	N/A	28.29	7.10	2.71	09/01/2013
<i>MSCI ACW Ex US Val Index (USD) (Net)</i>			-10.71	-9.17	-13.97	-13.97	4.75	-0.38	5.95	22.66	8.92	1.87	
<i>IM Int'l Large Cap Value Equity (SA+CF)</i>			-12.88	-11.94	-14.64	-14.64	3.66	1.03	7.45	26.02	4.10	3.48	
T. Rowe Price Int'l Core	521,648,729	2.24	-14.05	-13.69	-15.06	-15.06	4.23	1.38	N/A	28.92	3.41	3.96	09/01/2013
<i>MSCI EAFE Index (USD) (Net)</i>			-12.54	-11.35	-13.79	-13.79	2.87	0.53	6.32	25.03	1.00	2.92	
<i>IM Int'l Large Cap Core Equity (SA+CF)</i>			-13.19	-12.27	-14.63	-14.63	3.11	1.32	7.73	26.49	1.38	3.78	
Neuberger Berman Int'l	197,700,458	0.85	-14.66	-14.61	-15.77	-15.77	2.45	N/A	N/A	28.31	-0.52	1.76	12/01/2015
<i>MSCI EAFE Index (USD) (Net)</i>			-12.54	-11.35	-13.79	-13.79	2.87	0.53	6.32	25.03	1.00	2.34	
<i>IM Int'l Large Cap Core Equity (SA+CF)</i>			-13.19	-12.27	-14.63	-14.63	3.11	1.32	7.73	26.49	1.38	2.56	
MFS Int'l Large Cap Growth	430,918,068	1.85	-11.77	-9.68	-8.30	-8.30	8.19	4.32	N/A	34.12	2.96	4.90	10/01/2013
<i>MSCI ACW Ex US Grth Index (USD) (Net)</i>			-12.20	-12.43	-14.43	-14.43	4.19	1.69	7.15	32.01	0.12	2.49	
<i>IM Int'l Large Cap Growth Equity (SA+CF)</i>			-14.25	-13.37	-13.90	-13.90	4.11	2.19	8.60	31.37	-0.07	3.26	
Templeton Int'l Small Cap Equity	322,159,486	1.39	-14.96	-16.63	-17.83	-17.83	3.19	1.92	N/A	33.64	0.06	2.81	10/01/2013
<i>MSCI ACW Ex US Sm Cap Index (USD) (Net)</i>			-14.43	-15.72	-18.20	-18.20	3.82	1.96	10.02	31.65	3.91	2.74	
<i>IM Int'l Small Cap Equity (SA+CF)</i>			-16.65	-17.30	-18.62	-18.62	3.62	3.04	12.00	34.97	1.13	4.13	
BLK MSCI World Ex-US IM Custom Factor Index	654,454,628	2.82	-14.03	-12.09	-13.70	-13.70	N/A	N/A	N/A	N/A	N/A	-2.61	07/01/2017
<i>MSCI Wrld Ex US IM Index (USD) (Net)</i>			-13.28	-12.43	-14.68	-14.68	3.21	0.59	6.68	25.17	2.95	-3.80	
BLK FTSE Developed Ex US Min Var Index	211,997,676	0.91	-10.12	-9.20	-10.38	-10.38	5.80	N/A	N/A	26.76	4.26	5.45	12/01/2015
<i>FTSE Developed Ex US Min Var Index</i>			-10.13	-9.23	-10.65	-10.65	5.58	4.08	9.08	26.77	3.90	5.27	
Alliance Bernstein MSCI World Ex US IM Index	710,333,864	3.06	-13.22	-12.33	-14.33	-14.33	2.90	0.53	6.44	25.83	1.07	4.87	06/01/1998
<i>AB Non-US Developed Markets Custom Index</i>			-13.28	-12.43	-14.68	-14.68	2.73	0.45	6.27	25.82	1.00	3.61	
<i>IM Int'l Large Cap Core Equity (SA+CF)</i>			-13.19	-12.27	-14.63	-14.63	3.11	1.32	7.73	26.49	1.38	5.04	

Performance shown is gross of fees, except for Absolute Return, Private Equity, Real Estate, and Real Return investments, which are shown net of fees. Since Inception date shown represents the first full month following initial funding. Fiscal year ends June 30. For other performance-related comments, please see the Addendum. For additional information, please see the Glossary. *Indicates performance is lagged 1 quarter.

New Mexico State Investment Council
Asset Allocation & Performance - Composites & Managers

As of December 31, 2018

	Allocation		Performance (%)										
	Market Value (\$)	%	QTD	FYTD	CYTD	1 Year	3 Years	5 Years	10 Years	2017	2016	Since Incep.	Inception Date
Non-US Emerging Markets Composite	869,911,677	3.74	-7.69	-9.84	-16.32	-16.32	8.96	0.93	7.64	39.90	10.50	7.49	05/01/1999
<i>MSCI Emg Mkts Index (USD) (Net)</i>			-7.47	-8.49	-14.58	-14.58	9.25	1.65	8.02	37.28	11.19	7.38	
<i>IM Emerging Markets Equity (SA+CF)</i>			-7.28	-9.48	-15.23	-15.23	8.69	2.25	9.38	36.92	10.16	9.14	
BlackRock Emg Mkts Opp Fund	503,134,565	2.16	-7.89	-8.87	-15.55	-15.55	10.34	3.13	N/A	39.85	13.74	3.34	10/01/2013
<i>MSCI Emg Mkts Index (USD) (Net)</i>			-7.47	-8.49	-14.58	-14.58	9.25	1.65	8.02	37.28	11.19	1.92	
<i>IM Emerging Markets Equity (SA+CF) Median</i>			-7.28	-9.48	-15.23	-15.23	8.69	2.25	9.38	36.92	10.16	2.56	
William Blair Emg Mkts	297,132,104	1.28	-7.73	-12.02	-18.09	-18.09	6.64	N/A	N/A	42.23	4.09	5.24	12/01/2015
<i>MSCI Emg Mkts Index (USD) (Net)</i>			-7.47	-8.49	-14.58	-14.58	9.25	1.65	8.02	37.28	11.19	8.19	
<i>IM Emerging Markets Equity (SA+CF) Median</i>			-7.28	-9.48	-15.23	-15.23	8.69	2.25	9.38	36.92	10.16	7.61	
Alliance Bernstein Emerging Markets Index	69,625,567	0.30	-6.03	-7.43	-13.98	-13.98	9.15	1.49	N/A	36.11	11.07	1.78	11/01/2012
<i>MSCI Emg Mkts Index (USD) (Net)</i>			-7.47	-8.49	-14.58	-14.58	9.25	1.65	8.02	37.28	11.19	1.89	
<i>IM Emerging Markets Equity (SA+CF) Median</i>			-7.28	-9.48	-15.23	-15.23	8.69	2.25	9.38	36.92	10.16	3.09	
Fixed Income													
Fixed Income Composite	6,110,420,360	26.29	0.42	1.19	1.49	1.49	4.28	3.78	6.10	5.86	5.53	4.99	05/01/1999
<i>Bloomberg US Unv Bond Index</i>			1.17	1.44	-0.25	-0.25	2.56	2.72	4.06	4.09	3.91	4.88	
Core Fixed Income Composite	3,973,192,269	17.10	0.91	1.30	0.39	0.39	3.44	3.38	N/A	4.89	5.10	3.92	12/01/2010
BlackRock Core Bonds Fund	1,213,209,503	5.22	2.57	1.96	0.87	0.87	2.28	N/A	N/A	3.36	2.64	1.96	11/01/2014
J.P. Morgan Asset Mgmt Short Duration	409,640,386	1.76	1.07	1.51	1.64	1.64	N/A	N/A	N/A	1.29	N/A	1.15	05/01/2016
Loomis Sayles Bloomberg US Universal	660,282,534	2.84	0.70	1.07	0.15	0.15	4.47	3.66	N/A	5.22	8.19	4.41	04/01/2011
PIMCO Bloomberg US Universal	141,823,558	0.61	1.02	1.58	1.42	1.42	4.35	3.85	N/A	6.41	5.27	4.10	04/01/2011
PIMCO Investment Grade Active	346,824,881	1.49	-0.07	1.18	-1.11	-1.11	N/A	N/A	N/A	N/A	N/A	-1.11	01/01/2018
PGIM Bloomberg US Universal	651,425,380	2.80	0.40	1.05	-0.09	-0.09	4.40	4.04	N/A	7.09	6.35	4.94	04/01/2011
Shenkman HY Short Duration	549,986,020	2.37	-1.30	0.34	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0.79	05/01/2018
<i>Bloomberg US Agg Bond Index</i>			1.64	1.66	0.01	0.01	2.06	2.52	3.48	3.54	2.65	7.27	01/01/1976
<i>IM U.S. Broad Market Core FI (SA+CF)</i>			1.40	1.60	0.07	0.07	2.48	2.86	4.41	4.05	3.11	N/A	
Non-Core Fixed Income Composite	2,137,228,091	9.20	-0.49	0.80	3.00	3.00	5.07	3.81	N/A	7.99	4.27	5.70	12/01/2010
Absolute Return Composite	87,909,897	0.38	0.26	2.52	5.16	5.16	4.92	2.97	4.34	8.59	1.14	2.77	09/01/2005
Non-Core Fixed Income Pool	684,590,969	2.95	-0.03	1.47	4.41	4.41	13.91	9.28	17.11	5.03	34.77	4.67	04/01/2006
Rio Grande Fund LLC	700,092,214	3.01	0.36	1.92	4.65	4.65	6.61	N/A	N/A	9.47	5.77	5.33	04/01/2014
Unconstrained Fixed Income Pool	332,886,620	1.43	-0.84	-0.65	-0.33	-0.33	3.93	2.57	N/A	5.77	6.48	2.52	12/01/2013
Bank Loan Pool	331,748,390	1.43	-3.09	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-2.42	09/01/2018
<i>Non-Core Fixed Income Custom Index</i>			-2.84	-1.16	-0.81	-0.81	5.70	4.12	8.57	6.16	12.14	5.51	01/01/2005
Cash Equivalent Composite	353,318,816	1.52	0.58	1.07	1.80	1.80	1.14	0.75	0.81	1.24	0.39	3.56	07/01/1988
<i>ICE BofAML 3 Mo US T-Bill Index</i>			0.56	1.06	1.87	1.87	1.02	0.63	0.37	0.86	0.33	3.22	

Performance shown is gross of fees, except for Absolute Return, Private Equity, Real Estate, and Real Return investments, which are shown net of fees. Since Inception date shown represents the first full month following initial funding. Fiscal year ends June 30. For other performance-related comments, please see the Addendum. For additional information, please see the Glossary. *Indicates performance is lagged 1 quarter.

New Mexico State Investment Council
Asset Allocation & Performance - Composites & Managers

As of December 31, 2018

	Allocation		Performance (%)										
	Market Value (\$)	%	QTD	FYTD	CYTD	1 Year	3 Years	5 Years	10 Years	2017	2016	Since Incep.	Inception Date
Private Equity													
Private Equity Composite (Ex. State)*	2,305,986,816	9.92	2.98	8.40	14.05	14.05	12.40	10.61	8.82	15.93	7.39	5.66	06/01/2001
<i>Cambridge US Prvt Eq Index (Lagged 1 Qtr)</i>			3.79	9.35	18.01	18.01	14.49	13.40	11.99	17.01	8.69	11.74	
Real Estate													
Townsend-Reported Real Estate Composite*	2,057,587,740	8.85	1.80	3.55	10.27	10.27	9.94	11.56	3.92	8.04	11.52	5.19	10/01/2004
<i>NCREIF ODCE Index (AWA) (Net) (Lagged 1 Qtr)</i>			1.87	3.71	7.71	7.71	7.83	9.71	4.62	6.70	9.08	7.13	
<i>NCREIF/Townsend Wtd Index (Lagged 1 Qtr)</i>			1.73	3.78	8.78	8.78	9.17	11.04	4.71	8.19	10.57	7.81	
Real Return													
Real Return Composite*	1,925,361,764	8.28	-3.65	-1.63	1.88	1.88	5.60	2.82	N/A	5.74	9.30	3.96	06/01/2012
<i>Real Return Custom Index</i>			-2.29	-2.67	-1.66	-1.66	2.56	0.32	2.24	3.27	6.23	0.53	
Financial Real Return Composite	337,469,420	1.45	-20.78	-18.76	-16.52	-16.52	-1.75	-2.28	N/A	0.25	13.34	-1.47	06/01/2013
<i>Real Return Custom Index</i>			-2.29	-2.67	-1.66	-1.66	2.56	0.32	2.24	3.27	6.23	0.16	
Harvest MLP	337,469,420	1.45	-20.78	-15.88	-13.55	-13.55	-0.84	N/A	N/A	-5.66	19.55	-10.10	05/01/2015
<i>S&P MLP Index (TR)</i>			-17.80	-12.55	-11.67	-11.67	0.57	-6.59	10.35	-5.58	21.95	-11.42	
Townsend-Reported Real Return*	1,452,881,105	6.25	1.48	2.22	7.06	7.06	9.22	5.85	N/A	10.69	9.94	9.34	04/01/2011
ETI													
Economically Targeted Investments	40,618,426	0.17	0.05	0.42	5.17	5.17	3.09	3.19	0.64	-0.80	5.01	-0.69	07/01/1998
<i>ICE BofAML 3 Mo US T-Bill Index</i>			0.56	1.06	1.87	1.87	1.02	0.63	0.37	0.86	0.33	1.98	
Severance Tax State PE Program*	407,902,900	1.76	-0.05	9.15	25.83	25.83	8.38	8.97	5.52	-4.28	5.70	-1.44	08/01/2001
<i>Cambridge US VC Index (Lagged 1 Qtr)</i>			5.20	11.50	19.19	19.19	9.52	14.93	11.01	8.01	2.04	4.13	

Performance shown is gross of fees, except for Absolute Return, Private Equity, Real Estate, and Real Return investments, which are shown net of fees. Since Inception date shown represents the first full month following initial funding. Fiscal year ends June 30. For other performance-related comments, please see the Addendum. For additional information, please see the Glossary. *Indicates performance is lagged 1 quarter.

NEW MEXICO RETIREE HEALTH CARE AUTHORITY
CHANGE IN NET ASSET VALUE
FOR THE MONTH ENDED
March 31, 2019

	Large Cap Index	Non US Dev Index	Non US Emg Index	Small Mid Cap	Credit and Structure	Core Bond	Private Equity	Real Estate	Real Asset	Total
Market Value 2/28/2019	\$90,463,662.37	\$89,002,854.69	\$65,922,230.91	\$12,181,841.80	\$99,688,682.71	\$136,722,422.71	\$72,373,413.28	\$67,930,606.31	\$32,742,189.90	\$667,027,904.68
CONTRIBUTIONS	1,400,000.00	1,400,000.00	1,000,000.00	200,000.00	1,500,000.00	2,000,000.00	1,000,000.00	1,000,000.00	500,000.00	10,000,000.00
WITHDRAWALS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
FEES	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
INCOME EARNED	141,670.47	442,537.87	81,199.15	16,275.47	16,487.12	352,213.10	44,624.41	177,372.06	71,940.91	1,344,320.56
CAPITAL APPR/DEPR	1,456,737.00	(31,215.23)	359,508.67	(195,930.63)	538,384.94	2,452,590.83	62,272.53	980,635.91	201,222.45	5,824,206.47
Market Value 3/31/2019	\$93,462,069.84	\$90,814,177.33	\$67,362,938.73	\$12,202,186.64	\$101,743,554.77	\$141,527,226.64	\$73,480,310.22	\$70,088,614.28	\$33,515,353.26	\$684,196,431.71

Healthcare Benefits Administration Program & Program Support **FY20 Contract Amendments/New Contracts – Action Item***

The charts below include a list of existing contracts that need to be amended, as well as new contracts for fiscal year 2020 required to meet our business obligations with regard to the administration of both the Healthcare Benefits Administration Program and Program Support.

Healthcare Benefits Administration Program FY20 Proposed Contract Amendments

The proposed contracts administered through the Healthcare Benefits Administration Program are as follows:

FY20 Approved Operating Budget (Contractual Services)		\$354,743,400					
Healthcare Benefits Administration		FY19					
	Amount	FY19	FY20	%		Contract	
	Encumbered YTD	Projected	Proposed	Change	Type	Term	
BCBS							
1	Non-Medicare/Supplement	\$ 113,500,000	\$109,148,909	\$ 120,000,000	6%	Term/Comp	July 1, 2016 - June 30, 2020
2	Medicare Advantage	\$ 5,500,000	\$ 4,731,113	\$ 5,500,000	0%	Term/Comp	July 1, 2016 - June 30, 2020
Presbyterian							
3	Non-Medicare	\$ 48,500,000	\$ 45,103,598	\$ 50,000,000	3%	Term/Comp	July 1, 2016 - June 30, 2020
4	Medicare Advantage	\$ 16,125,000	\$ 16,100,157	\$ 20,000,000	24%	Term/Comp	July 1, 2016 - June 30, 2020
5	NM Health Connections	\$ 275,000	\$ 191,956	\$ -	-100%	NA	July 1, 2016 - June 30, 2020
6	UnitedHealthcare	\$ 6,535,000	\$ 6,508,282	\$ 8,500,000	30%	Term/Comp	July 1, 2016 - June 30, 2020
7	Humana	\$ 1,500,000	\$ 852,934	\$ 2,000,000	33%	Term/Comp	July 1, 2016 - June 30, 2020
8	United Concordia	\$ 10,750,000	\$ 10,178,924	\$ 10,750,000	0%	Term/Comp	July 1, 2016 - June 30, 2020
9	Delta	\$ 10,825,000	\$ 10,784,478	\$ 11,750,000	9%	Term/Comp	July 1, 2016 - June 30, 2020
10	Davis Vision	\$ 2,500,000	\$ 2,379,115	\$ 2,650,000	6%	Term/Comp	July 1, 2016 - June 30, 2020
11	Express Scripts	\$ 105,000,000	\$ 84,577,714	\$ 105,000,000	0%	Term/Comp	July 1, 2018 - June 30, 2022
12	Life (New)*	\$ 11,675,000	\$ 11,649,766	\$ 13,250,000	13%	New	July 1, 2019 - June 30, 2023
Total		\$ 332,685,000	\$302,206,946	\$ 349,400,000	5%		
Unencumbered Balance		NA	NA	\$ 5,343,400		Available for End-of-Year Adjustments	

The proposed amounts for FY20 use our FY19 projected expenditures as a baseline and assume the following variables:

1. Blue Cross Blue Shield – participation in the supplement plan and non-Medicare will continue to remain relatively flat, as a result of continued migration to the Medicare Advantage Plan and Value Plan offerings. However, medical trend remains in the mid-single digits.
2. Blue Cross Blue Shield (Medicare Advantage) – participation levels are projected to decline through FY20, partly offset by a projected increase in premium effective January 1, 2020.
3. Presbyterian – pre-Medicare plan participation is expected to remain largely flat, however, medical trend remains in the mid-single digits.
4. Presbyterian (Medicare Advantage) – staff expects continued growth in this plan, as members will continue to be defaulted to this option if they are part of the PHP plan as a pre-Medicare member, combined with a likely, but unknown rate increase effective January 1, 2020.
5. New Mexico Health Connections – NMRHCA is no longer contracted with NMHC.
6. UnitedHealthcare – staff expects continued growth in this plan, as it provides and attractive alternative for folks participating in the Medicare Supplement plan, combined with a likely, but unknown rate increase effective January 1, 2020.
7. Humana – staff expects continued growth in this plan, as members will continue to be defaulted to this option if they are part of the BCBS plan as a pre-Medicare member, combined with a likely, but unknown rate increase effective January 1, 2020.
8. United Concordia – projected costs are based upon a similar growth pattern experienced in FY19 for voluntary benefits.
9. Delta Dental – projected costs are based upon a similar growth pattern experienced in FY19 for voluntary benefits.

10. Davis Vision – projected costs are based upon a similar growth pattern experienced in FY19 for voluntary benefits.
11. Express Scripts – projected costs will be reflected in a new PBM contract beginning July 1, 2019.
12. Selected Life Insurance Vendor – projected costs based on new Term Life Insurance agreement resulting from contract negotiation per RFP#90-342-18-00001 (pending GSD/SPD approval, contract will be brought before the Board for final approval).

Conclusion: Upon final review and amendment of the listed contracts, \$5.3 million remains unobligated and available for year-end adjustments based on increases/decreases in participation and volatility associated with all self-insured claims.

Program Support FY20 Proposed Contract Amendments/New

The proposed contracts administered through Program Support are as follows:

FY20 Approved Operating Budget (Contractual Services)	\$616,600					
Program Support	FY19					
	Amount	FY19	FY20	%		Contract
	Encumbered YTD	Projected	Proposed	Change	Type	Term
1 Segal	\$ 345,000	\$ 315,000	\$ 345,000	0%	New	July 1, 2019 - June 30, 2023
2 Moss Adams	\$ 70,129	\$ 70,129	\$ 71,363	2%	Term/Comp	July 1, 2017 - June 30, 2020
3 Rodey	\$ 35,000	\$ 35,000	\$ 40,000	14%	New/Small	July 1, 2019 - June 30, 2020
4 CLA	\$ 9,500	\$ 9,500	\$ 10,000	5%	New/Small	July 1, 2019 - June 30, 2020
5 Real Time Solutions	\$ 4,515	\$ 4,515	\$ 4,515	0%	Price Agreement	July 1, 2019 - June 30, 2020
6 RE/SPEC	\$ 70,000	\$ 70,000	\$ 60,000	-14%	Price Agreement	NA
7 Risksense	\$ 12,945	\$ 12,945	\$ 12,945	0%	New/Small	July 1, 2019 - June 30, 2020
8 Wilshire	\$ 5,000	\$ 5,000	\$ -	-100%		
9 Work Quest	\$ 8,993	\$ 8,993	\$ -	-100%		
10 HealthLinx	\$ 2,363	\$ 2,363	\$ -	-100%		
Total	\$ 563,445	\$ 533,445	\$ 543,823			
Unencumbered Balance	NA	# NA	\$72,777.00	# \$0.00	# Available for End-of-Year Adjustments	

The proposed contracts and amounts for FY20 assume the following:

1. Segal – response to 2018 RFP for benefit consulting services, solvency projections, GAS employer allocation schedules, HIPAA compliance support.
2. Moss Adams - financial Audit/GAS 74 & 75 – amount based on 2017 RFP.
3. Rodey – legal fees consistent with historical expenditures and contingencies.
4. CliftonLarsonAllen (CLA) – small purchase contract for GAS 75 employer allocation review.
5. Real Time Solutions – licensing amount for website hosting.
6. RE/SPEC – projected amounts associated with ongoing maintenance related to CareView
7. RiskSense – security assessment of IT system.
8. Wilshire - NA
9. Work Quest – consistent with historical expenditures.
10. HealthLinx - NA

Conclusion: Upon final review and amendment of the listed contracts, \$72.7 thousand remains unobligated and available to accommodate anticipated expenditures related to the consulting services specific to the medical, dental and vision RFP, and investment advisory services (spring 2020).

Summary: NMRHCA staff respectfully requests approval of the proposed contract amendments and new contracts listed above.

Medical, Dental, Vision Consultant RFP – Action Item*

Background: Consistent with the requirements contained in the Health Care Purchasing Act, the New Mexico Retiree Health Care Authority (NMRHCA) in cooperation with the other members of the interagency benefits advisory committee including: Albuquerque Public Schools, New Mexico Public School Insurance Authority and the State of New Mexico are preparing to issue a request for proposals (RFP) for medical, dental, vision and Medicare Advantage services (“the big bid”) scheduled for release in early to mid-September 2019.

NMRHCA staff is currently working with the APS staff, who will serve as the procurement manager for the big bid, to finalize an RFP for benefit consulting services specific to the big bid. In order to streamline the procurement process all IBAC members have agreed to recommend to their governing organizations to enter into a Memorandum of Understanding with APS for benefit consulting services and pay their prorated portion of the contract.

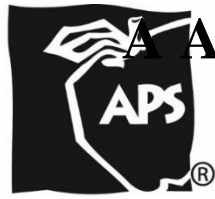
Scope of Work:

See proposed draft.

Proposed Timeline:

The RFP is scheduled for release early to mid-May with a contract issued by June and work is expected to commence immediately upon approval.

Action Item: NMRHCA staff respectfully requests approval to issue an RFP for benefit consulting services related to the upcoming big bid.



ALBUQUERQUE PUBLIC SCHOOLS REQUEST FOR PROPOSAL

RFP # XXXX

**RFP TITLE: Consultant for IBAC Medical, Dental & Vision Plan
Procurement**

RFP Schedule

Action	Date & Time
RFP Issued	XX/XX/2019
Pre-proposal Meeting	NA
Pre-proposal Location	NA
Deadline for Questions	Xx/xx/2019 @ 5:00pm (local time)
Deadline for Acknowledgement of Receipt Form	Xx/xx/2019 @ 5:00pm (local time)
RFP Due Date and Time	XX/XX/2019 @ 3:00pm (local time)
<i>Proposals must be received by the due date and time. No late proposals will be accepted. The only acceptable evidence to establish the time of receipt is the date/time stamp imprint from the APS Procurement bid clock.</i>	
Evaluation of Proposals	TBD
Contract Negotiations	TBD

RFP Buyer Contact Information

Name	Marilee P. Gallacher
Phone Number	505-878-6118
E-Mail	Marilee.Gallacher@aps.edu
<i>Any inquiries or requests regarding clarification of this RFP document shall be submitted to the buyer in writing. Offerors may contact ONLY the buyer regarding the terminology stated in the procurement documents.</i>	

RFP Submittal Location

Physical Address (No USPS Mail*) For Walk-in Delivery or Carrier Service (UPS, FedEx, etc.)	USPS Mailing Address Allow 5 additional business days for APS internal delivery
Albuquerque Public Schools ATTN: Procurement Department 6400 Uptown Blvd. NE, Suite 500E Albuquerque, NM 87110	Albuquerque Public Schools ATTN: Procurement Department, City Center, Suite 500E P.O. Box 25704 Albuquerque, NM 87124-0704
<p>Ensure that the following RFP information is clearly labeled on the sealed package containing the RFP submission. Please note: if the sealed proposal is placed inside a carrier envelope or package for shipping, all of this information must be re-written and clearly visible on the outermost envelope or package containing the sealed proposal:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Offeror's Business Name (not an individual's name) <input type="checkbox"/> RFP Number & Title <input type="checkbox"/> RFP Due Date & Time <p>*APS does not have a mailbox on site. US Postal Service Mail is accepted only at the PO Box address. If a letter or parcel is mailed via the USPS to the APS physical address, it will NOT reach our office.</p>	

RFP Term

Albuquerque Public Schools reserves the right to enter into a one (1) year contract with the awarded Offeror(s).
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OFFEROR'S GENERAL INSTRUCTIONS

1. **READ ALL DOCUMENTS:** Offerors must familiarize themselves with all documents contained herein; it is mandatory that all submitted offers be in compliance with all the provisions contained in the Request for Proposal. Offerors should promptly notify the Buyer of any ambiguity, inconsistency, error, or missing attachments which they may discover upon examination of the RFP.
2. **OFFICIAL CONTACT:** Offerors may contact **ONLY** the Buyer regarding the terminology stated in the procurement documents. Other APS employees do not have the authority to respond on behalf of APS.

Offerors **MAY NOT** contact other APS departments, employees or the evaluation committee. Any contact with an APS department, employee or evaluation committee may result in rejection of any proposal.

Any other verbal communication will be deemed unofficial and non-binding. Communication directed to parties other than the Buyer will have no legal bearing on this RFP or the resulting contract(s). Any response made by APS will be provided in writing to all Offerors by addendum; no verbal responses shall be authoritative.
3. **WRITTEN QUESTIONS:** Potential Offerors may submit written questions to the Buyer as to the intent or clarity of this RFP. All written questions must be addressed and submitted to the Buyer **NO LATER** than the date and time specified in this RFP. All times are subject to the local time zone. The Buyer will respond in a timely manner subject to the complexity of the questions. Buyer will **ONLY** respond to the written questions submitted and receive on or prior to the deadline in this RFP.
4. **SUBMISSION:** The submission of a proposal constitutes a representation by the Offeror that the Offeror has made all appropriate examinations, investigations, and analysis and has made provision as to the cost thereof in submitted proposal. By responding to this RFP, Offerors acknowledge and agree to the terms and conditions set forth in this RFP.
5. **ELECTRONIC RFP DOCUMENTS:** This RFP is being made available by electronic means. In the event of conflict between a version of the RFP in the Offeror's possession and the version maintained by APS, the Offeror acknowledges that the version maintained by APS shall govern.
6. **INCURRING COSTS:** Any cost incurred by the potential Offeror in preparation, transmittal, and/or presentation of any proposal or material submitted in response to this RFP shall be borne solely by the Offeror. If applicable, any cost incurred by the Offeror for set up and demonstration of the proposed equipment and/or system shall be borne solely by the Offeror.
7. **PROPOSAL OFFER FIRM:** Responses to this RFP, including proposal prices for services, will be considered firm for one hundred twenty (120) days after due date. If a best and final offer is requested, the offer is good for ninety (90) days after receipt of best and final offer.
8. **FORMS AND ATTACHMENTS:** It is the responsibility of every Offeror to ensure they have downloaded the latest version of each RFP, including any addendum(s) which may have been issued and posted on the APS Procurement Department Website.
9. **ADDENDUM(S):** No Addendum will be issued later than **FIVE (5)** days prior to the date for receipt of proposals, except an Addendum withdrawing the RFP or one which extends the date for receipt of proposals.

Offerors should revisit the website (<http://www.aps.edu/procurement>), then select, "See Current Bids and RFPs") prior to the due date before submitting their proposal to Albuquerque Public Schools. All addendums must be acknowledged in the submitted proposal.
10. **CORRECTIONS:** Corrections shall be initialed in ink by the Offeror signing the proposal. Offerors will be allowed to withdraw their proposals at any time prior to the deadline for receipt of proposals. The Offeror must submit a written withdrawal request to withdraw their proposal. The approval or denial of withdrawal requests received after the deadline for receipt of the proposals is governed by the applicable procurement regulations.
11. **EXCEPTIONS:** Any exceptions to the scope of work and/or specifications shall be listed separately in the submitted proposal and unless otherwise stated, specifications and/or scope of work attached are the minimum requirements. Minor deviations to the specifications as listed, may be considered.

The Buyer, after review of the proposals may request clarifications on information submitted by any and all Offerors in a written format, with a specified deadline for response.

12. **DISTRICT DISCRETION:** APS reserves the right, pursuant NMSA 1978, §13-1-132, in its sole discretion to waive minor informalities in proposals submitted provided that such informalities have no effect on price, quality, quantity or any matter to be evaluated in making a selection and confer no material advantage on the Offeror whose nonconformity is waived. APS reserves the right to add to or delete from the Scope of Work set forth in this RFP.
13. **BRAND NAMES:** Where a brand-name or equal specification is used in a solicitation, the use of a brand name is for the purpose of describing the standard of quality, performance and characteristics desired and is not intended to limit or restrict competition. If a vendor proposes an “equal” to scope of work/specifications, APS is the sole interpreter of the scope of work/specifications and sole judge as to whether the “equal” proposed complies with the scope of work/specifications.
14. **OFFEROR QUALIFICATIONS:** The Evaluation Committee may make such investigations as necessary to determine the ability of the potential Offeror to adhere to the requirement specified within this RFP. The Evaluation Committee may reject the proposal of any potential Offeror who is deemed not to be a responsible Offeror or fails to submit a responsive offer as defined in NMSA 1978, §13-1-83 and §13-1-85.
15. **AWARD:** APS reserves the right to award all, part or none of the Scope of Work set forth in this RFP. This procurement in no manner obligates Albuquerque Public Schools until a valid signed contract and/or valid Purchase Order is executed.
16. **PREFERENCES:** RFPs may be awarded preference in compliance with NMSA 1978, §13-1-21 for New Mexico In-State Resident Business and Resident Veteran Business. Offerors shall include in their proposal a copy of the certificate issued by State of New Mexico Taxation & Revenue. If Proposal is Joint Venture, Offeror shall state in submitted offer the percentage of work that will be performed by Resident Business and/or Resident Veteran Business. **PLEASE NOTE: An Offeror cannot be awarded both a resident preference and a resident veteran business preference. The New Mexico Preferences shall not apply when the expenditures for this RFP includes federal funds.**
17. **TIMELY SUBMISSIONS:** All Offeror proposals must be received for review and evaluation no later than the time and date specified in this RFP. Time is subject to local time. Albuquerque Public Schools does not accept proposals electronically, by fax, or email. **A hardcopy with an original signature MUST be submitted.**

It is the Offeror’s responsibility to ensure the proposal arrives before the due date and time. Offerors are cautioned that “late is late”. It is the responsibility of the Offerors to allow sufficient time for the hazards such as, traffic, weather, parking, locating the proper office, third party delivery, US Postal Service mail delivery, etc. Any and all proposals not received by the proposal submission due date and time shall be rejected. No late proposals will be accepted under any circumstances, not even if the delivery service is late or at fault. It is recommended to send your proposal early.

APS may in its sole discretion extend the time for the submission of proposals upon a finding that it is in the interest of APS to do so. Such extensions shall be by addendum(s), which may be issued before the submission due date.

18. **RFP CANCELLATION OR REJECTION:** In accordance with NMSA 1978, §13-1-131, this RFP may be canceled or proposals may be rejected in whole or in part when it is in the best interest of Albuquerque Public Schools.
19. **RFP OPENING:** Submitted proposals shall not be publicly opened. The contents of the proposals shall not be disclosed during any negotiations that may occur. A public log will be kept of the names of all Offeror organizations that submitted proposals. Pursuant to NMSA 1978, §13-1-116, the contents of proposals shall not be disclosed to competing potential Offerors during the negotiation process. The negotiation process is

deemed to be in effect until the contract is awarded pursuant to this Request for Proposals. Awarded in this context means the final required APS signature on the contract(s) resulting from the procurement has been obtained.

20. **RESPONSIBLE AND RESPONSIVE OFFER:** APS Procurement may reject the proposal of any potential Offeror who is not a responsible Offeror or fails to submit a responsive offer as defined in NMSA 1978, §13-1-83 and §13-1-85.
21. **SOLE RESPONSE:** Any sole response that is received may be rejected by APS depending on available competition and timely needs of APS. APS reserves the right to award the contract to the responsible Offeror submitted responsive proposals most advantageous and in the best interest of APS.
22. **NEGOTIATIONS:** APS reserves the right to discontinue negotiations with any Offeror.
23. **MULTI-AWARD:** APS reserves the right to multi-award contracts as necessary for adequate delivery or service in accordance with NMSA 1978, §13-1-153.
24. **AFTER AWARD:** After final contract is negotiated, approved and awarded, all proposal documents pertaining to this procurement will be open to the public, except for the material, which is proprietary or confidential. The Procurement Department will not disclose or make public any pages of a proposal on which the Offeror has stamped or imprinted “**Proprietary**” or “**Confidential**” subject to the following requirements.

Proprietary or confidential data shall be readily separable from the proposal in order to facilitate eventual public inspection of the non-confidential portion of the proposal. Confidential data is normally restricted to confidential financial information concerning the Offeror’s organization and data that qualifies as trade secret in accordance with the Uniform Trade Act, NMSA 1978, §57-3A-7. The price of products offered or the cost of services proposed shall not be designated as proprietary or confidential information.
25. **ASSIGNMENT:** It is mutually understood and agreed that the successful Offeror(s) shall not assign, transfer, convey, sublet or otherwise dispose of the purchase order, contract, or his/her right, title of interest therein, or power to execute such purchase order or contract to any other person, company or corporation without the previous written consent of APS.
26. **GOVERNING BODY APPROVAL:** The award of this contract is not final until approved by the governing bodies (if applicable) and/or contract is signed by all parties.
27. **DEFINITIONS:** Definition of Terminology: This section contains definitions that are used throughout this procurement document, including appropriate abbreviations.
“**Agency**” shall mean Albuquerque Public Schools (APS).

“**Award of Contract**” shall mean a formal written notice by APS that a firm(s) has/have been selected to enter into a contract for services.

“**Contract**” shall mean an agreement for the procurement of items of tangible personal property or services.

“**Contractor**” shall mean the successful Offeror.

“**Determination**” shall mean the written documentation of a decision of a procurement manager including findings of fact required to support a decision. A determination becomes part of the procurement file to which it pertains.

“**Desirable**” the terms “**may**”, “**can**”, “**should**”, or “**prefers**” identify a desirable or discretionary item or factor.

“**Evaluation Committee**” shall mean a body appointed by the Agency management to evaluate proposals and make selection recommendation.

“**Finalist**” is defined as an Offeror who meets all the mandatory specifications of the RFP and whose score on evaluation factors is sufficiently high to qualify that Offeror for further consideration by the Evaluation Committee.

“Mandatory” the terms **“must”**, **“shall”**, **“will”**, **“is required”**, or **“are required”**, identify a mandatory item or factor. Failure to meet a mandatory item or factor will result in the rejection of the Offeror’s proposal.

“Offer” – the term means “proposal”, “solution”, means all documents submitted to APS Procurement responding to RFP.

“Offeror”, **“Bidder”**, or **“Proposer”** is any person, corporation, or partnership who chooses to submit a proposal in response to this RFP.

“Owner” shall be Albuquerque Public Schools.

“Purchasing Agent” shall mean the RFP Buyer, as noted on the RFP Cover Sheet.

“Purchase Order” shall mean the document, which directs a Contractor to deliver items of tangible personal property or services pursuant to an existing contract.

“Request for Proposal” or **“RFP”** means all documents, including those attached or incorporated by reference, used for soliciting proposals.

“Responsible Offeror” shall mean an Offeror who submits a responsive proposal and who has furnished, when required, information and data to prove that its financial resources, production or service facilities, personnel, service reputation and experience are adequate to make satisfactory delivery of the services or items of tangible property described in the RFP.

“Responsive Offer” or **“Responsive Proposal”** shall mean a proposal which conforms in all material respects to the requirements set forth in the RFP.

TERMS AND CONDITIONS

1. **TERM:** APS reserves the right to procure the services/goods as described in this RFP and enter into a contract as described on RFP front cover.
2. **REQUEST(S) NOT DEFINED IN SCOPE OF WORK:** Contractor shall be held responsible to **NOT** fill requests which are clearly beyond the defined scope of this contract. Should such requests occur, Contractor has the responsibility of calling such violations to the attention of the APS Procurement Officer.
3. **TAXES:** APS holds a Class 9 Nontaxable Transaction Certificate and is exempt from payment of taxes on tangible personal property. A NTTC will be issued upon request.
4. **NON-APPROPRIATION:** APS' obligation to make payment under the terms of this RFP is contingent upon its appropriation of sufficient funds to make those payments. If APS does not appropriate funds for the continuation of this procurement, this procurement will terminate upon written notice of that effect to the Contractor. APS determination that sufficient funds have not been appropriated is firm, binding and not subject to review.
5. **PROCUREMENT CODE:** The Procurement Code, NMSA 1978, §13-1-28 through §13-1-199, imposes civil and misdemeanor criminal penalties for its violation. In addition, the New Mexico Criminal Statutes impose felony penalties for bribes, gratuities, and kickbacks.
6. **TERMINATION:** Either party may terminate this contract as follows:
 - A. Termination by the Contractor
 1. The Contractor may terminate this contract **only** if Albuquerque Public School District fails to comply with any provisions of this contract and after receiving notice of the noncompliance APS fails to cure the noncompliance within ten (10) days, or
 2. By written mutual agreement between the Contractor and APS.
 - B. Termination by APS
 1. For Cause
 - a. The occurrence of either one of the following events will justify termination for cause:
 - i. Contractor's persistent failure to perform the work in accordance with the contract documents (including but not limited to, failure to supply sufficient skilled workers or suitable materials or equipment).
 - ii. Contractor's violation in any substantial way of any provisions of this contract.
 - b. If either one of the events identified above occur, APS may, after giving Contractor (and the surety, if any) ten (10) days written notice, terminate the service of Contractor, exclude Contractor from site, and take possession of the work. Contractor shall be paid for project costs incurred up to the date of termination but shall not be paid for loss of profits resulting from such termination.
 - c. Where Contractor's services have been so terminated by APS, the termination will not affect any rights or remedies of APS against Contractor then existing or which may thereafter accrue. Any retention or payment of moneys due the Contractor by APS will not release the Contractor from liability.
 2. For Convenience
 - a. Upon ten (10) days written notice to Contractor, APS may without cause and without prejudice to any other right or remedy of APS, elect to terminate the contract.
 - b. In such case, Contractor shall be paid (without duplication of any items):
 - i. For completed and acceptable work executed in accordance with the contract documents prior to the effective date of termination.

- ii. For expenses sustained prior to the effective date of termination in performing services and furnishing labor, materials or equipment as required by the contract document in connection with uncompleted work.
 - c. Contractor shall not be paid on account of loss of anticipated profits or revenue or other economic loss arising out of or resulting from such termination.
7. **INDEMNIFICATION:** The Offeror shall be responsible for damage to persons or property that occurs as a result of Offeror's fault or negligence, or that of any of his/her employees, agents or subcontractors. Offeror shall save and hold harmless Albuquerque Public Schools against any and all losses, cost, damage, claims, expenses or liability in connection with the performance of the contract. Any equipment or facilities damaged by the Offeror's operation shall be repaired and/or restored to their original condition at the Offeror's expense.
8. **INSURANCE (If Applicable):** The successful Offeror shall purchase and maintain statutory limits of Worker's Compensation, Public Liability and Automobile Liability Insurance approved by APS at the time of contract award. Albuquerque Public Schools shall be included as a loss payee and/or additional insured. Public Liability and Automobile Liability insurance shall include at least the following coverage:

General Liability Insurance – per occurrence General Aggregate - \$2,000,000 Product/completed operations aggregate \$1,000,000	\$1,000,000
Bodily injury, per occurrence	\$1,000,000
Medical and medically-related expenses	\$5,000
Vehicle bodily injury, each occurrence, excluding medical and medically related expenses	\$750,000
Property Damage, per occurrence	\$1,000,000

Contractor shall furnish Owner with certificates of insurance with the contract documents and prior to the commencement of work.

NOTE: Certificate holder shall be: Board of Education
Albuquerque Public Schools

Certificate of Insurance forwarded to: Albuquerque Public Schools- Procurement Department
P.O. Box 25704
Albuquerque, New Mexico 87125

9. **AUDIT:** APS reserves the right to audit the Contractor's records associated with this contract at any time during the contract period and for a period of up to three years following the expiration or termination of the agreement. Such audit may be conducted by APS personnel or a third party under contract with APS. APS shall give the Contractor reasonable notice prior to the conduct of any audit and upon receiving the notice from APS the Contractor agrees to fully cooperate with the auditors. If Contractor subcontracts any portion of its obligation to another party, Contractor shall guarantee APS' access to books and records of such party.
10. **GOVERNING LAW:** This RFP and any contract with an Offeror which may result from this procurement shall be governed by the laws of the State of New Mexico.
11. **INDEPENDENT CONTRACTOR:** The Contractor is an independent contractor performing services for APS. The Contractor shall not accrue leave, retirement, insurance, or any other benefits afforded to employees of APS as a result of this procurement.
12. **DEBARMENT OR SUSPENSION:** A business (Contractor, Subcontractor or Supplier) that has either been debarred or suspended pursuant to the requirements of NMSA 1978, §13-1-177 through §13-1-180, and §13-

4-11 through §13-4-17 as amended, shall not be permitted to do business with APS and shall not be considered for award of the contract during the period for which it is debarred or suspended with APS.

13. **CONFLICT OF INTEREST:** By submitting a proposal, the Offeror certifies that no relationship exists between the Offeror and APS that interferes with fair competition or is a conflict of interest; and no relationship exists between such propose and another person or firm that constitutes a conflict of interest that is adverse to APS.
14. **NON-DISCLOSURE:** The Offeror shall not disclose any information relating to students, and employees of APS other than such information that may be authorized by the individual student or employee. Vendor agrees to indemnify and hold harmless APS from any damages, claims, liabilities, and costs including reasonable attorney fees in the event any unauthorized release of such information occurs.
15. **DELIVERY:** The goods shall be delivered free of the rightful claim of any third person, any security interest or other lien. Unless otherwise agreed all goods called for in this RFP shall be tendered in a single delivery and payment is due only upon such delivery (NET 30).
16. **FOB:** Unless stated otherwise, the price for goods is FOB: Destination (APS' designated address).
17. **DELAYS IN DELIVERY:** Time is of the essence and this purchase may be subject to termination for failure to deliver on time, unless delay was caused by APS. If delay in delivery is foreseen, Seller must notify the APS Requesting Department of late delivery, cause of late delivery and remedy for late delivery.
18. **INSPECTION:** Final inspection will be made at the destination upon completion of delivery of goods/services. Final inspection shall include any testing or inspection procedures required by the specifications.
19. **ACCEPTANCE:** Acceptance of delivery of goods/services shall not be considered acceptance of the goods/services furnished. Acceptance occurs when the Requesting Department, after a reasonable opportunity to inspect the goods/services, signifies to the seller that are goods/services are conforming and fails to make an effective rejection.
20. **BUYERS REVOCATION OF ACCEPTANCE:** Requesting Department can revoke acceptance of goods when it is discovered, in a reasonable time, that the Sellers nonconforming goods substantially impair the value of the goods.
21. **SELLERS RIGHT TO CURE A NONCONFORMING DELIVERY OF GOODS:** The Seller, upon notice of revocation of acceptance, shall correct without charge and deliver conforming goods in a reasonable time.
22. **PAYMENT:** Any invoice received and payment made shall be subject to APS' terms and conditions (NET 30) unless specifically waived by APS in a separate written document.
23. **ASSIGNMENTS:** The awarded contractor shall not assign nor delegate specific duties as part of this RFP not transfer any interest not assign any claims for money due or to become due under this RFP without the written consent of APS.

PROTESTS

Any Offeror who is aggrieved in connection with a solicitation or award of an Agreement may protest to the Purchasing Office in accordance with the requirements of the Contracting Procurement Regulations and the State Procurement Code. The protest should be made in writing within twenty-four (24) hours after the facts or occurrences giving rise thereto, but **NO LATER THAN** fifteen (15) calendar days after the facts or occurrences giving rise thereto (NMSA 1978, §13-1-172). The protest must be in writing and delivered to the Executive Director - Procurement Department, Albuquerque, New Mexico. See APS address information on RFP Cover Sheet.

1. In the event of a timely protest under this section, the Purchasing Agent and the Agency shall not proceed further with the procurement unless the Purchasing Agent makes a determination that the award of Agreement is necessary to protect substantial interests of the Contracting Agency (NMSA 1978, §13-1-173).
2. The Purchasing Agent or his/her Designee shall have the authority to take any action reasonably necessary to resolve a protest of an aggrieved Offeror concerning a procurement. This authority shall be exercised in accordance with adopted regulations, but shall not include the authority to award money damages or attorneys' fees (NMSA 1978, §13-1-174).
3. The Purchasing Agent or his/her Designee shall promptly issue a determination relating to the protest. The determination shall:
 - A. State the reasons for the action taken; and
 - B. Inform the protestant of the right to judicial review of the determination pursuant to NMSA 1978, §13-1-183.
5. A copy of the determination issued under NMSA 1978, §13-1-175 shall immediately be mailed to the protestant and other Offerors involved in the procurement in compliance with NMSA 1978, §13-1-176.

SCOPE OF WORK

OVERVIEW

The IBAC is a joint purchasing collective established by state statute which consists of the following entities (and their membership):

State of New Mexico's Risk Management Division
New Mexico Public Schools Insurance Authority
New Mexico Retiree Health Care Authority
Albuquerque Public Schools

All IBAC entities currently provide comprehensive medical, dental, and vision benefits to their members (employees/retirees and eligible dependents). A majority of these benefits are self-insured; though, there are some fully insured offerings as well. Plan designs and carriers differ. Please reference each entities' web site for additional information.

<http://nmrhca.org>

<https://www.generalservices.state.nm.us/rmd/benefits.html> or <https://www.mybenefitsnm.com>

<https://nmopsia.com/index.html>

<https://www.aps.edu/human-resources/benefits>

A focus of this RFP will be the pursuit of specific objectives related to the following elements of value-based purchasing and the IBAC will place emphasis on these items throughout the totality of this procurement cycle.

A. Value-Based Plan Design

- a. Cost-sharing (deductible, coinsurance or copayment) adjustment for member engagement.
- b. Cost-sharing adjustment for high-value service
- c. Cost-sharing adjustment for low-value service

B. Enhanced and Standardized Reporting

1. HEDIS
2. Market-based (but standardized) outcomes measurement
3. Increased detail for high-dollar claimants. Require medical plan administrator Case Manager to verify that member has been:
 - a. Correctly diagnosed
 - b. Implemented appropriate course of treatment for diagnosis

C. Value-Based Provider Reimbursement – Consideration to be given to opportunities both with and without medical plan administrator participation

1. Reference Pricing
2. Bundled Payments
3. Integrated Care Model Risk Sharing
4. Pay for Performance

RFP SCHEDULE

The RFP Buyer will make every effort to adhere to the RFP Schedule as noted on front cover of this RFP. The schedule is subject to change by addendum. The evaluation committee **MAY** interview the Offeror(s) of the top rated proposals; however, contracts may be awarded without such interviews and based solely on written offers. Finalists will be contacted to schedule interviews if required. If an interview is requested, evaluation scores will be re-scored to reflect written response and interview response.

PURPOSE OF THIS REQUEST FOR PROPOSAL

The purpose of the Request for Proposal (RFP) is to solicit sealed proposals, to establish a contract through competitive negotiations for the procurement of consulting/project management services to assist in the

procurement of medical, dental and visions plans for The Interagency Benefits Advisory Committee (IBAC) and its approximately 200,000 members.

The scope of this procurement is limited to consulting services associated with the development of a comprehensive medical, dental and vision RFP, the evaluation of elements of the resulting proposals, provision of reports (both detailed and summaries) and assistance with finalist interviews.

Any inquiries or requests regarding this procurement should be submitted to the Procurement Manager in writing. See Cover Page of RFP. Offerors may contact ONLY the Procurement Manager regarding the procurement. Other state employees do not have the authority to respond on behalf of the Agency.

SUMMARY SCOPE OF WORK

APS is seeking a consultant to assist in the procurement of IBAC medical, dental and vision services effective July 1, 2020 for State of New Mexico Risk Management Division, New Mexico Public Schools Insurance Authority, New Mexico Retiree Health Care Authority and effective January 1, 2021 for Albuquerque Public Schools. The consultant will assist with the following services:

1. Develop an IBAC-specific Request For Proposal (RFP) for medical, dental, and vision services based on input and direction from IBAC member agencies and assist with the state-mandated publication of the RFP.
2. Evaluate each proposal's Minimum Requirements and Financial sections and provide a report detailing the results of this analysis.
3. Evaluate the technical and service sections of the medical finalists and dental and vision finalists as selected by the IBAC.
4. Complete a comprehensive evaluation of the top medical proposals and top dental and vision proposals for each category and provide a summary report.
5. Assist with finalist interviews including best and final offers.

PROPOSAL SPECIFICATIONS

Offerors should respond to the following specifications in the form of a thorough narrative to each mandatory specification. The narratives along with required supporting materials will be evaluated and awarded points accordingly.

1. **Corporate Experience – Traditional Provider Network Valuations (18 Points):** Offerors must submit a statement of relevant corporate experience within the last five (5) years, including the experience of major subcontractors, if any. The narrative in response to this factor must thoroughly describe the Offeror's experience with providing consulting services related to medical, dental and vision benefits-related purchases and services using a traditional valuation of provider network unit cost comparisons.

In this Section, the Offeror shall provide the following information (referencing the subsections in sequence) to evidence the Offeror's experience in delivering services such as those sought under this RFP:

- a. A brief statement of how long the Offeror has been performing the services sought under this RFP.
- b. A description of the experience level, technical and application knowledge, and public sector experience of the corporate resources that may be used for the services under this contract.
- c. A description of the service provided.

- d. A statement of why the Offeror believes these services constitutes relevant corporate experience to this procurement.
- e. A list, if any of all current contractual relationships with the State of New Mexico (including any of the IBAC agencies) or those contracts completed in the past five years. The listing should include the contract number, contract term, and procuring State Agency for each reference.

2. **Corporate Experience – Evaluation of Value Based Purchasing Initiatives (18 Points):** Offerors must submit a statement of relevant corporate experience including the experience of major subcontractors, if any. The narrative in response to this factor must thoroughly describe the Offeror’s experience with providing consulting services related to medical, dental and vision benefits-related purchases and services specifically related to evaluating value based purchasing initiatives. See Overview on page 14 of this RFP.

In this Section, the Offeror shall provide the following information (referencing the subsections in sequence) to evidence the Offeror’s experience in delivering services such as those sought under this RFP:

- a. A brief statement of how long the Offeror has been performing the services sought under this RFP.
- b. A description of the experience level, technical and application knowledge, and public sector experience of the corporate resources that may be used for the services under this contract.
- c. A description of the service provided.
- d. A statement of why the Offeror believes these services constitutes relevant corporate experience to this procurement.
- e. A list, if any of all current contractual relationships with the State of New Mexico (including any of the IBAC agencies) or those contracts completed in the past five years. The listing should include the contract number, contract term, and procuring State Agency for each reference.

3. **Account Management (36 Points):** Offerors must submit resumes of all proposed professional staff members who will be performing services under the contract. Experience narratives shall be attached that describe the specific relevant experience of the staff members in relation to the role that member will perform for this contract. The narrative(s) must include the name of the individual(s) proposed and should include a thorough description of the education, knowledge, and relevant experience as well as certifications or other professional credentials that clearly shows how they are qualified to provide the required services to the IBAC.

4. **Cost (25 Points):** The cost associated with the services to be performed under this proposal. The lowest costing Offeror’s quote will be used as the basis for all other calculations and receive the full 25 points. All other Offerors will be awarded points based on their relationship to the “basis” offer. Please ensure all proposals include and itemize appropriate GRT or other applicable taxes.

5. **Corporate References (3 Points):** Offerors must submit three (3) external references from clients who have received similar services to those proposed by the Offeror for this contract, especially those projects in the public sector that have occurred within the past five (5) years. Each reference must include the name of the company, company current address, name of the contact person, telephone number, and the date and description of the services provided.

Note: The Offeror is responsible for verifying reference contact information. The Evaluation Committee is not obligated to try to locate persons not found at the numbers or places given in the proposals. Obsolete or wrong Contact information could result in a “fail” score in this category.

6. **Oral Presentation (50 Points):** If selected as a finalist, the Offeror shall provide the Evaluation Committee the opportunity to interview all proposed core staff during an oral presentation at a date, time, and place set by the Procurement Manager. The individuals who will be performing services under the contract shall present the Offeror's proposal to the Evaluation Committee.

EVALUATION CRITERIA

EVALUATION CRITERIA

Proposals must address each of the following criteria. Each proposal may be awarded points up to the numeric value listed. Points will be awarded in compliance with NMSA 1978, §13-1-21, for New Mexico In-State Resident Business and Resident Veteran Business. If proposal is a Joint Venture, Offeror shall state in submitted proposal the percentage of work that will be performed by Resident Business and/or Resident Veteran Business. Please Note: An Offeror cannot be awarded both a resident preference and a resident veteran business preference. Offerors shall include in their proposal a copy of certificate issued by State of New Mexico Taxation & Revenue. The Preference does not apply if APS is utilizing federal funds.

*****The Offeror should contact Buyer for clarification of evaluation criteria or terminology*****

	Possible Points	Points This RFP
Corporate Experience – Traditional Provider Network Valuations Offerors must submit a statement of relevant corporate experience including the experience of major subcontractors, if any. The narrative in response to this factor must thoroughly describe the Offeror’s experience with providing consulting services related to medical, dental and vision benefits-related purchases and services specifically evaluating value based purchasing initiatives. See Proposal Specifications, Item 1	18	
Corporate Experience – Evaluation of Value Based Purchasing Initiatives Offerors must submit a statement of relevant corporate experience including the experience of major subcontractors, if any. The narrative in response to this factor must thoroughly describe the Offeror’s experience with providing consulting services related to medical, dental and vision benefits-related purchases and services specifically evaluating value based purchasing initiatives to include elements from Proposal Specifications, Item 2.	18	
Account Management Offerors must submit resumes of all proposed professional staff members who will be performing services under the contract. Experience narratives shall be attached that describe the specific relevant experience of the staff members in relation to the role that member will perform for this contract. The narrative(s) must include the name of the individual(s) proposed and should include a thorough description of the education, knowledge, and relevant experience as well as certifications or other professional credentials that clearly shows how they are qualified to provide the required services to the Agency. See Proposal Specifications, Item 3.	36	
Corporate References Offerors must submit three (3) external corporate references from clients who have received similar services to those proposed by the Offeror for this contract, especially those projects in the public sector that have occurred within the past five (5) years. Offers that propose to use Subcontractors for significant portions of the scope of work must include three (3) external references for each major Subcontractor. Each reference must include the name of the company, company current address, name of the contact person, telephone number, and the date and description of the services provided. See Proposal Specifications, Item 5.	3	
Cost The cost associated with the services to be performed under this proposal. The lowest costing Offeror’s quote will be used as the basis for all other calculations and receive the full 25 points. All other Offerors will be awarded points based on their relationship to the “basis” offer. Please ensure all proposals include and itemize appropriate GRT or other applicable taxes.	25	

Total Possible Points	100	
Interview / Finalist Oral Presentation (if needed)	50	
New Mexico Resident Business Preference: Five percent of the total possible points to a resident business. Offeror shall include a copy of their In-State Certificate issued by State of New Mexico Taxation & Revenue Department.	5	
Veteran New Mexico Resident Business Preference: Ten percent of the total possible points to a resident veteran business. <ul style="list-style-type: none"> 10 points for Resident Veteran Business/Contractor with annual revenues of \$3 million or less as verified by State of NM Tax & Revenue. 	10	
Total Possible Awarded Points	100-160	

Note: FAILURE to adequately address and meet the above requirements may be cause for the proposal to be deemed non-responsive by the Buyer.

SUBMITTAL REQUIREMENTS

(For ease of evaluation, Proposals should be formatted in the order as listed below)

The Offeror is particularly encouraged to address all points that will be evaluated as described herein in each point of the evaluation criteria. If a factor of evaluation is not adequately responded to by the Offeror, the Offeror may be determined to be non-responsive.

Offeror shall submit one (1) original proposal clearly marked **ORIGINAL**, six (6) identical copies clearly marked **COPY** and one (1) identical electronic copy (flash drive clearly labeled with your company name and RFP number). *Email and fax copies are NOT an acceptable form of an electronic copy.*

PROPOSAL – DETAILED REQUIREMENTS

1. Proposal Format and Organization

Proposals shall be submitted in a three-ring binder. Page format shall be 8-1/2” x 11” with foldout sheets (if any) allowed up to 11” x 17” in size. Foldout pages shall be counted as two pages **and shall be numbered as such**. Text will be no smaller than 10 point.

Proposals shall not exceed 60 pages total for all of the tabbed sections listed below excluding Tab 1, 6 and 7. Each sheet face that is printed with text or graphics counts as one page. Tab Dividers do not count as pages, provided the only text or graphics on the dividers are the tab numbers and section titles. Front and Back covers do not count towards page count.

Tab 1 – Letter of Submittal

Tab 2 – Qualifications

Tab 3 – Experience

Tab 4 – Assigned Personnel to APS

Tab 5 – Approach/Methodology

Tab 6 – Price Proposal

Tab 7– Required Forms

FORMS & ATTACHMENTS

ACKNOWLEDGEMENT OF RECEIPT FORM

RFP 19-xxxMG-RA Consultant for IBAC Medical, Dental & Vision Plan Procurement

Acknowledgement of Receipt submission deadline: xx/xx/2019 @ 5:00PM (local time)

**Submit completed and signed Acknowledgement form via email to:
Marilee.Gallacher@aps.edu**

In acknowledgement of receipt of this Request for Proposal, the undersigned agrees that he/she has received a complete copy from the APS website (<https://www.aps.edu/procurement/current-bids-and-rfps>) beginning with the title page and table of contents, and ending with any Addendum.

The Acknowledgement of Receipt should be signed and returned to the Procurement Manager at the email address above, no later than 5:00 PM local time on [month date, 2019]. Only potential Offerors who elect to return this form, signed and completed with the indicated intention of submitting a proposal, will receive email notifications and electronic copies of all Offeror written questions and the Agency's written responses to those questions, as well as email notification of RFP addenda, if any are issued.

FIRM: _____

REPRESENTED BY (Print Name): _____

TITLE: _____ PHONE #: _____

E-MAIL ADDRESS (Required): _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE: _____

SIGNATURE: _____ DATE: _____

The above name and email address will be used for all correspondence related to the Request for Proposal.

This Firm does | does not (circle one) intend to respond to this Request for Proposal.

LETTER OF TRANSMITTAL FORM
SUBMIT WITH YOUR PROPOSAL

Items one (1) to four (4) each **MUST** have a response, failure to respond to all four items **WILL** result in the disqualification of your proposal.

1. Identity (Name) and Mailing Address of the submitting organization:

2. For the Person authorized by the organization to contractually obligate the organization:

Name	
Title	
E-Mail Address	
Telephone/Fax number	

3. For the person authorized to negotiate the contract on behalf of the organization:

Name	
Title	
E-Mail Address	
Telephone/Fax number	

4. For the person to be contacted for clarifications:

Name	
Title	
E-Mail Address	
Telephone/Fax number	

- On behalf of the submitting organization named in item one (1) above, I accept the Terms and Conditions governing the Procurement.
- I agree that submission of our proposal constitutes acceptance of the Evaluation Factors contained in this RFP.
- I acknowledge receipt of any and all amendments of this RFP.

SIGN
HERE

Authorized Signature and Date (**Must be signed** by the person identified in Item #2, above.)

COMPLIANCE

(REQUIRED LEGAL FORMS)

All of the following forms must be signed and submitted with your proposal or your proposal may be rejected.

CAMPAIGN CONTRIBUTION DISCLOSURE FORM

Pursuant to NMSA 1978, § 13-1-191.1 (2006), any person seeking to enter into a contract with any state agency or local public body **for professional services, a design and build project delivery system, or the design and installation of measures the primary purpose of which is to conserve natural resources** must file this form with that state agency or local public body. This form must be filed even if the contract qualifies as a small purchase or a sole source contract. The Prospective Contractor must disclose whether they, a family member or a representative of the Prospective Contractor has made a campaign contribution to an applicable public official of the state or a local public body during the two years prior to the date on which the Contractor submits a proposal or, in the case of a sole source or small purchase contract, the two years prior to the date the contractor signs the contract, if the aggregate total of contributions given by the Prospective Contractor, a family member or a representative of the Prospective Contractor to the public official exceeds two hundred and fifty dollars (\$250) over the two year period.

Furthermore, the state agency or local public body shall void an executed contract or cancel a solicitation or proposed award for a proposed contract if: 1) a Prospective Contractor, a family member of the prospective Contractor, or a representative of the Prospective Contractor gives a campaign contribution or other thing of value to an applicable public official or the applicable public official's employees during the pendency of the procurement process or 2) a Prospective Contractor fails to submit a fully completed disclosure statement pursuant to the law.

THIS FORM MUST BE FILED BY ANY PROSPECTIVE CONTRACTOR WHETHER OR NOT THEY, THEIR FAMILY MEMBER, OR THEIR REPRESENTATIVE HAS MADE ANY CONTRIBUTIONS SUBJECT TO DISCLOSURE.

The following definitions apply:

“Applicable public official” means a person elected to an office or a person appointed to complete a term of an elected office, who has the authority to award or influence the award of the contract for which the Prospective Contractor is submitting a competitive sealed proposal or who has the authority to negotiate a sole source or small purchase contract that may be awarded without submission of a sealed competitive proposal.

“Campaign Contribution” means a gift, subscription, loan, advance or deposit of money or other thing of value, including the estimated value of an in-kind contribution, that is made to or received by an applicable public official or any person authorized to raise, collect or expend contributions on that official's behalf for the purpose of electing the official to federal, statewide or local office. “Campaign Contribution” includes the payment of a debt incurred in an election campaign, but does not include the value of services provided without compensation or unreimbursed travel or other personal expenses of individuals who volunteer a portion or all of their time on behalf of a candidate or political committee, nor does it include the administrative or solicitation expenses of a political committee that are paid by an organization that sponsors the committee.

“Family member” means spouse, father, mother, child, father-in-law, mother-in-law, daughter-in-law or son-in-law.

“Pendency of the procurement process” means the time period commencing with the public notice of the request for proposals and ending with the award of the contract or the cancellation of the request for proposals.

“Person” means any corporation, partnership, individual, joint venture, association or any other private legal entity.

“Prospective Contractor” means a person who is subject to the competitive sealed proposal process set forth in the Procurement Code or is not required to submit a competitive sealed proposal because that person qualifies for a sole source or a small purchase contract.

“Representative of a Prospective Contractor” means an officer or director of a corporation, a member or manager of a limited liability corporation, a partner of a partnership or a trustee of a trust of the Prospective Contractor.

DISCLOSURE OF CONTRIBUTIONS:

Contribution Made By: _____

Relation to Prospective Contractor: _____

Name of Applicable Public Official: _____

Date Contribution(s) Made: _____

Amount(s) of Contribution(s) _____

Nature of Contribution(s) _____

Purpose of Contribution(s) _____

Signature Date

Title (position)

– OR –

NO CONTRIBUTIONS IN THE AGGREGATE TOTAL OVER TWO HUNDRED FIFTY DOLLARS (\$250) WERE MADE to an applicable public official by me, a family member or representative.

Signature Date

Title (position)

Offeror Business Name

**SIGN
WHERE
APPLICABLE**

CONFLICT OF INTEREST, NON-COLLUSION AND DEBARMENT/SUSPENSION CERTIFICATION FORM

CONFLICT OF INTEREST

As utilized herein, the term "Vendor" shall mean that entity submitting a proposal to Albuquerque Public Schools in response to the above referenced bids/request for proposals.

The authorized Person, Firm and/or Corporation states that to the best of his/her belief and knowledge:

No employee or board member of Albuquerque Public Schools (or close relative), with the exception of the person(s) identified below, has a direct or indirect financial interest in the Vendor or in the proposed transaction. Vendor neither employs, nor is negotiating to employ, any Albuquerque Public Schools employee, board member or close relative, with the exception of the person(s) identified below. Vendor did not participate, directly or indirectly, in the preparation of specifications upon which the quote or offer is made. If the Vendor is a New Mexico State Legislator or if a New Mexico State Legislator holds a controlling interest in Vendor, please identify the legislator: _____ List below the name(s) of any Albuquerque Public Schools employee, board member or close relative who now or within the preceding 12 months (1) works for the Vendor; (2) has an ownership interest in the Vendor (other than as an owner of less than 1% of Vendor's stock, if Vendor is a publicly traded corporation); (3) is a partner, officer, director, trustee or consultant to the Vendor; (4) has received grant, travel, honoraria or other similar support from Vendor; or (5) has a right to receive royalties from the vendor.

CERTIFICATION OF NON-COLLUSION STATEMENT

Vendor certifies under penalty of perjury that its response to this procurement solicitation is in all respects bona fide, fair, and made without collusion or fraud with any person, joint venture, partnership, corporation or other business or legal entity. Does vendor agree? **YES** Initials of Authorized Representative of vendor _____

DEBARMENT/SUSPENSION STATUS

The Vendor certifies that it is not suspended, debarred or ineligible from entering into contracts with the Federal Government, or any State agency or local public body, or in receipt of a notice or proposed debarment from any Federal or State agency or local public body. The vendor agrees to provide immediate notice to Albuquerque Public School's Purchasing Department in the event of being suspended, debarred or declared ineligible by any department or agency of the Federal government, or any agency of local public body of the State of New Mexico, or upon receipt of a notice of proposed debarment that is received after the submission of the quote or offer but prior to the award of the purchase order or contract.

CERTIFICATION

The undersigned hereby certifies that he/she has read the above CONFLICT OF INTEREST, NON-COLLUSION and DEBARMENT/SUSPENSION Status requirements and that he/she understands and will comply with these requirements. The undersigned further certifies that they have the authority to certify compliance for the vendor named **and that the information contained in this document is true and accurate to the best of their knowledge.**

Signature: _____ Date: _____

Name of Person Signing (typed or printed): _____

Title: _____

Email: _____

Name of Company (typed or printed): _____

Address: _____ City/ State: _____

SIGN
HERE

ALBUQUERQUE PUBLIC SCHOOLS
TERMS AND CONDITIONS
STATEMENT OF CONFIDENTIALITY

The undersigned employee of/subcontractor to _____, hereinafter referred to as "Offeror" and/or "Contractor", agrees, during the RFP process, and during the term of the Contract between Contractor and the Albuquerque Public Schools (APS) and forever thereafter, to keep confidential all information and material provided by APS or otherwise acquired by the Employee/Subcontractor, excepting only such information as is already known to the public, and including any such information and material relating to Attachments of this RFP, and relating to any client, vendor, or other party transacting business with APS, and not to release, use or disclose the same except with the prior written permission of APS. This obligation shall survive the termination or cancellation of the Contract between Contractor and APS or of the undersigned's employment or affiliation with Contractor, even if occasioned by Contractor's breach or wrongful termination.

The undersigned recognizes that the disclosure of information may give rise to irreparable injury to APS, a client or customer of APS, or to the owner of such information, inadequately compensable in damages and that, accordingly, APS or such other party may seek and obtain injunctive relief against the breach or threatened breach of the within undertakings, in addition to any other legal remedies which may be available. The undersigned acknowledges that he or she may be personally subject to civil and/or criminal proceedings for such breach or threatened breach.



Signature

Title

Offeror Business Name

Date

PROPOSAL SUBMITTAL REQUIREMENTS AND CHECKLIST

Please submit your completed proposal, including the following items. Note that the requested information is mandatory and **failure to submit these items with your response may deem it non-responsive and may be disqualified.**

- ☐ Acknowledgement of Receipt, **SIGNED**
- ☐ Letter of transmittal, **SIGNED**
- ☐ Evaluation Criteria Documentation
- ☐ Price Proposal
- ☐ Completed Conflict of Interest and Debarment/Suspension Form, **SIGNED**
- ☐ Campaign Contributions Disclosure Form, **SIGNED**
- ☐ Statement of Confidentiality, **SIGNED**
- ☐ Resident Contractor (or Veteran Resident Contractor) Preference Certificate – if applicable
- ☐ Addendums (if applicable) – **before** submitting your proposal, please check for addendums here:
<http://www.aps.edu/procurement/current-bids-and-rfps>

- ☐ The following RFP information must be clearly labeled on the **outer envelope of your sealed proposal**.
Please note: If you put your sealed proposal inside a FedEx, UPS, etc. envelope, all of this information must also be written and visible on the outermost envelope of your sealed proposal:
 - ☐ **Offeror's Business Name** (not an individual's name)
 - ☐ RFP Number & Title
 - ☐ RFP Due Date & Time
 - ☐ Proper Delivery Address (see cover page)

** If items are not completed as required, your proposal may be deemed non-responsive.*

Out-of-state Travel Request (Action Item)

Background. New Mexico Retiree Health Care Authority staff has been invited to attend the 2019 Major Accounts Council to be held at the Health Care Service Corporation Headquarters in Chicago, IL on May 28 – 30. This event includes participation from all major accounts (including members of the IBAC) for interactive discussion with senior leaders from Blue Cross Blue Shield to discuss ongoing trends and solutions in the healthcare market. A draft agenda is as follows:

- Opening Remarks/State of the Union from Darrell Beckett,VP
- TBD, Plan President Segment
- Product: Current products in flight, products in development, future products, council polling on priority of future products
- Pharmacy: Trends, Updates and Pharmacy Integration
- TBD, Energy Vertical Segment
- Advanced Analytics, Reporting and Benchmarking
- Government Relations Briefing
- TBD, Cost of Care Leadership Panel Discussion
- Omada Health and BCBS
- New Employer Strategies for Tackling Depression, Opioid Abuse and Preventive Care
-

Requested Action. NMRHCA staff respectfully requests permission to attend the 2019 Major Accounts Council in Chicago, IL on May 28 – 30, 2019.

2020 Preliminary Plan Recommendations

Pre-Medicare/Medicare Rates

1. Increase retiree premiums in accordance with projected medical trend for all self-insured plans based on upon loss ratios calculated in May --- estimate available by June Board meeting for the following plans:
 - BCBS Premier
 - BCBS Value Plan
 - Presbyterian Premier
 - Presbyterian Value Plan
 - BCBS Medicare Supplement

NMRHCA's long-term solvency projections include annual 8% rate increases as part of its baseline assumptions in order to keep pace with rising medical costs. Changes to this rate of increase in any given year are based on an evaluation of NMRHCA's overall loss ratio (how closely NMRHCA rates match actual costs) or any changes made to the plans' cost-sharing provisions (deductibles, out-of-pocket maximums, etc.).

Pre-Medicare Plan Design

2. No recommended changes.

Pre-Medicare Subsidies

3. Spouse/domestic partner reduction – 2 percent / 36 to 34 percent

NMRHCA's five year strategic plan includes a provision to reduce the subsidies for pre-Medicare spouses. This would be the third phase of that process which has already reduced the subsidy level from 40% to 38% for plan year 2015 and from 38% to 36% in 2016.

4. Retiree subsidy reduction – 1 percent / 64 to 63 percent

NMRHCA's five year strategic plan also includes a provision to reduce the subsidies for pre-Medicare retirees. This would be the second phase of that process as the maximum subsidy was reduced from 65% to 64% in 2016.

Medicare Supplement Plan Design

5. Supplement – introduce \$250 copay for inpatient stay (1 per year)
 - 189 admits per 1,000 people = \$1 million savings
6. Supplement – increase annual Part B cost sharing by \$50
 - Approximately 21,000 x \$50 = \$1 million savings

Pharmacy Benefits

7. No recommended copay changes.
8. Evaluating the cost associated with the addition of Livongo.

Additional Variables Impacting Solvency Report/Year End Goals:

- Inclusion of minimum age and increased years of service requirement
- Life Insurance Rate Increase – 3.9%
- 3rd year of 4-year basic life phase out
- Medicare Advantage Rates – HIT Effective January 1, 2020
 - Estimated 14 – 45 percent increase across all MA plans
- Possible changes associated with medical, dental, vision and Medicare Advantage procurement effective July 1, 2020 (mid-calendar year).