

**Request for Quotation  
#OACT-393-2024-0013**

This is a Small Business Set Aside Request for Quotation prepared in accordance with FAR Part 13. THIS ANNOUNCEMENT CONSTITUTES THE ONLY SOLICITATION; A SEPARATE WRITTEN SOLICITATION WILL NOT BE ISSUED. QUOTES ARE BEING REQUESTED. The Centers for Medicare & Medicaid Services intends to award, under Simplified Acquisition Procedures (Dollar Threshold for Simplified Acquisitions \$250,000.00) a fixed price purchase order to procure on line access to A.M. Best L/H Financial Suite 2024 for 12 months, unlimited users in accordance with the attached Statement of Work. The North American Industry Classification Code (NAICS) is 513120. The estimated period of performance will be September 21, 2024 to September 20, 2025.

Your quote should include the following additional information:

1. Company Name, Address
2. Contact Person, name, Telephone Number, Fax Number, E-Mail Address
3. Business Size Classification, i.e. Small Disadvantaged, 8(a), Woman Owned
4. UEI Number
5. Tax ID NO.

Note: You must be registered and the registration current in (SAM) System for Award Management in order to receive a federal government award.

**All quotes must be received by August 01, 2024 no later than 12:00pm.**

Questions should be referred to: [Phillip.Harrell@cms.hhs.gov](mailto:Phillip.Harrell@cms.hhs.gov), office# (410)786-8635.

Quotes can be E-Mailed to: [Phillip.Harrell@cms.hhs.gov](mailto:Phillip.Harrell@cms.hhs.gov) or sent in hard copy to Phillip Harrell, Centers for Medicare and Medicaid Services, Office of Acquisition and Grants Management, 7500 Security Blvd., Baltimore, MD 21244.

**STATEMENT OF WORK  
5/14/2024**

**Background**

The National Health Expenditures Accounts (NHEA) are estimates of health spending for the United States produced by the Centers for Medicare & Medicaid Services' (CMS), Office of the Actuary (OACT), National Health Statistics Group (NHS). The National Health Expenditure Accounts (NHEA) are a matrix design that summarizes health spending by major service categories as well as the major sources of funding for each service category. Included among the sources of funds are the estimates for private health insurance (PHI). Estimates include the premiums earned

by private health insurers, benefits incurred and the net cost. Historically, the net cost estimate was made using a variety of data sources to produce premiums and benefits. These sources included but were not limited to: Blue Cross & Blue Shield, InterStudy, Office of Personnel Management (for federal employees), AM Best and more.

Over the last several years, many of these sources have changed their collection methods and can no longer provide NHSG with the data needed to make the PHI estimates. The data that we plan to license from AM Best will allow us to crosswalk company-by-company data in order to bridge between these older and newer data sources.

Several years ago, the AM Best Company, began collecting each insurance company's annual statement sent to the National Association of Insurance Commissioners (NAIC) (required by law). The NAIC is an organization of state insurance regulators for all 50 states, Washington, DC and the U.S. territories.

## **Project Objectives**

NHSG is presently involved in not only in making estimates for the NHEA, but in health care reform initiatives. AM Best offers online access to the latest health data without the need to install software. Online access to the latest health care financial data will enable the NHSG staff to provide breadth and depth to the private health insurance estimates that are becoming increasingly important as the Nation focuses on how and where to change the ever increasing cost of healthcare.

## **Scope of Work**

The contractor will provide CMS with direct online access to the Best Financial Suite L/H. The financial databases contain insurer financial information that capture all the data necessary to perform insurance industry research in total and by State for insurance companies. The contractor will provide online access and deliver:

- 12 month online access (*BestLink*) to Best Financial Suite L/H for 2025, unlimited users;
- The purchase will include:
  - Networking fees for unlimited users;
  - 100 Best's Review and 1 Best's Insurance News & Analysis subscription;
  - Access to Health Online and alert services

## **Technical Considerations**

1. The vendor currently has an electronic database that contains financial information for a sufficiently large segment of the private health insurance industry. This database allows for the estimation, evaluation, and comparison of specific segments of the private health insurance industry and will be used

as an input to the estimation of private health insurance estimates in the National Health Expenditure Accounts.

2. The vendor has data from numerous private health insurance plans.
3. The vendor currently has a system in place for ensuring the statistical reliability and consistency of the database.
4. The vendor has an ongoing quality assurance program that improves the accuracy of the data.
5. The vendor has provided information services related to numerous aspects of the private health insurance industry for a period of at least 10 years as demonstration of its ability to serve this market.
6. Compatibility with previously purchased AM Best Databases as well as current models that are used to produce private health insurance estimates in the National Health Expenditure Accounts.

#### **Schedule of Deliverables**

AM Best will provide CMS with online access and all deliverables upon receipt of a purchase order.

#### **Period of Performance**

September 21, 2024 to September 20, 2025

#### **Section 508 compliance**

The deliverables shall comply with the standards, policies, and procedures below. In Event of conflicts between the referenced documents and this *SOW* the *SOW* shall take precedence.

##### Rehabilitation Act, Section 508 Accessibility Standards

1. 29 U.S.C. 794d (Rehabilitation Act as amended)
2. 36 CFR 1194 (508 Standards)
3. <http://www.access-board.gov/sec508/508standards.htm>
4. FAR 39.2 (Section 508)
5. CMS/HHS Standards, policies and procedures (Section 508)

**\*Note:** CMS acknowledges that Section 508 is not applicable to this purchase order as there are no CD-ROMS being delivered as the subscription is online only. \*

