New York State Minority and Women-Owned Business Enterprise (MWBE) Program Approved Utilization Plans/Waivers: Fiscal Year 2023/2024

Agency Name:	New York State Insurance Fund			
Date:		5/30/2024		

Agency Contact:				
Name:	Carrell Clarke-Europe			
Title:	MWBE/SDVOB Compliance Specialist			
Email Address:	MWBE_SDVOB@nysif.com			

(1) Description of Contract Scope Includes:

Construction
Non Construction
Commodities
Services

Services and Commodities

(2) Description of Approved Waiver Includes:

Lack of MWBE firms available

MWBE firms were non responsive to solicitations

Insufficient subcontracting opportunities

Specialized work/knowledge/equipment required

Location impacted availability

MWBE firms responded to solicitation but declined to bid

Change in budget and/or project phasing limited the scope for subcontracting

Change in timeline affected MWBE utilization and availability

MWBE bid(s) were too high compared to non-MWBE

No MWBE waiver requested

Other

					MWBE Certified	(1) Description of	
Prime Contractor Name	Contract term dates	Contr	ract Amount	(1) Description of Contract Scope	Subcontractor Name	Subcontract scope	(2) Description of Approved Waiver
Compulink Technolgies Inc	04/09/2023-04/08/2024	\$	28,800.00	Services and Commodities			No MWBE waiver requested
TI Solution Inc	05/07/2023-05/06/2025	\$	48,565.38	Services			MWBE bid(s) were too high compared to non-MWB
M. Davis and Company, Inc.	04/21/2023-04/20/2028	\$	500,000.00	Services			No MWBE waiver requested
EisnerAmper LLP	10/01/2023-09/30/2028	\$	4,357,025.00	Services			Insufficient subcontracting opportunities
BCA Reasearch Inc.	05/01/2023-04/30/2024	\$	33,075.00	Services			Insufficient subcontracting opportunities
Attucks Asset Management LLC	04/22/2023-04/21/2030	TBD	•	Services			Insufficient subcontracting opportunities
CreditSights, Inc.	06/22/2023-06/21/2026	\$	379,000.00	Services			Insufficient subcontracting opportunities
Oblong, Inc.	09/17/2023-09/16/2024	\$	49,990.00	Services and Commodities			No MWBE waiver requested
Legato Capital Management, LLC	04/22/2023-04/21/2030	TBD	•	Services			Insufficient subcontracting opportunities
Leading Edge Investment Advisor, LLC	05/26/2023-05/25/2030	TBD		Services			Insufficient subcontracting opportunities
Bivium Capital Partners, LLC	05/26/2023-05/25/2030	TBD		Services			Insufficient subcontracting opportunities
ARLS Consultants Inc.	05/26/2023-05/25/2023	\$	32,676.72	Services			Specialized work/knowledge/equipment required
Glass Lewis and Co, LLC	07/01/2023-06/30/2030	\$	317,800.00	Services			Insufficient subcontracting opportunities
Ti Solution Inc	06/13/2023-06/12/2024	\$	181,797.96	Services and Commodities			Other
Wright Business Systems Inc.	10/04/2023-09/09/2024	\$	38,880.00	Services and Commodities			No MWBE waiver requested
Mercer Investments, LLC	07/25/2023-07/24/2030	\$	3,837,296.00	Services			Insufficient subcontracting opportunities
Blackrock Financial Management Inc	07/17/2023-07/16/2028	TBD		Services			Insufficient subcontracting opportunities
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Goldman Sachs Asset Management LP (GSAM)	07/17/2023-07/16/2028	TBD		Services			Insufficient subcontracting opportunities
Invesco Advisers, Inc	07/17/2023-07/16/2028	TBD		Services			Insufficient subcontracting opportunities
Semper Capital Management LP	07/17/2023-07/16/2028	TBD		Services			Insufficient subcontracting opportunities
Pacific Investment Management Company LLC							0
(PIMCO)	07/17/2023-07/16/2028	TBD		Services			Insufficient subcontracting opportunities
Thundercat Technology Inc	05/05/2023-05/04/2024	\$	32,000.00	Commodities			MWBE firms were non responsive to solicitations
Reed Group Ltd	07/30/2023-07/29/2024	\$	299,999.70	Commodities			Specialized work/knowledge/equipment required
Ontum360 LLC		Ś	46 000 00	Services			Insufficient subcontracting opportunities
		Ś					No MWBE waiver requested
Tr Solution me.	03/00/2023 03/07/2023	Ť -	37,000.33	Commodities	-M-To-Pros		no mino e wanter requested
				Services		Services	
Iones Lang Lasalle Brokerage Inc	07/25/2023-07/24/2028	TRD					No MWBE waiver requested
	. , ., , ,		13.825.000.00	Services	,		Insufficient subcontracting opportunities
		TBD	.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	Services			Insufficient subcontracting opportunities
. ,	09/05/2023-09/04/2026	Ś	256,886.76				No MWBE waiver requested
	,,,- ,	Ś	,				No MWBE waiver requested
	, ,, -, -	Ś	,				Specialized work/knowledge/equipment required
			-,		1		No MWBE waiver requested
		Ś	-,				No MWBE waiver requested
.,	,-,	т	,		†		No MWBE waiver requested
E, SOIGHOID IIIC	03, 10, 2023 03, 13, 2024	\$	49.999.00		+	ļ	Insufficient subcontracting opportunities
	Compulink Technolgies Inc TI Solution Inc M. Davis and Company, Inc. EisnerAmper LLP BCA Reasearch Inc. Attucks Asset Management LLC CreditSights, Inc. Oblong, Inc. Legato Capital Management, LLC Leading Edge Investment Advisor, LLC Bivium Capital Partners, LLC ARLS Consultants Inc. Glass Lewis and Co, LLC TI Solution Inc Wright Business Systems Inc. Mercer Investments, LLC Blackrock Financial Management Inc Goldman Sachs Asset Management LP Goldman Sachs Asset Management LP Pacific Investment Management LP Pacific Investment Management LP Pacific Investment Management Company LLC (PIMCO) Thundercat Technology Inc	Compulink Technolgies Inc	Compulink Technolgies Inc	Compulink Technolgies Inc	Compulink Technolgies Inc	Prime Contractor Name	Compulsite Fechnoligies Inc.

					MWBE Certified	(1) Description of	
Contract Number	Prime Contractor Name	Contract term dates	Contract Amount	(1) Description of Contract Scope	Subcontractor Name	Subcontract scope	(2) Description of Approved Waiver
PO 348319	Pitchbook Data Inc	07/08/2023-07/07/2024	\$ 36,000.00	Services			Insufficient subcontracting opportunities
PO 348333	SWIFT Pan Americas Inc	05/16/2023-05/15/2024	\$ 25,357.43	Services			Specialized work/knowledge/equipment required
PO 348687	Pitchbook Data Inc	12/31/2023-12/30/2024	\$ 26,250.00	Services			Insufficient subcontracting opportunities
C000584	Raj Somas DBA RUSD Solutions	11/02/2023-11/01/2026	\$ 425,700.00	Services and Commodities			No MWBE waiver requested
PO 348740	Insurance Services Office Inc	10/01/2023-09/30/2026	\$ 30,500.00	Services			Specialized work/knowledge/equipment required
PO 348811	Park Lane Graphics	11/01/2023-09/09/2024	\$ 28,512.00	Services and Commodities			No MWBE waiver requested
C000588	Agios World Wide Inc	11/14/2023-11/13/2024	\$ 73,976.13	Services and Commodities			No MWBE waiver requested
C000589	Regiment Technology Group, LLC	11/10/2023-11/09/2024	\$ 71,894.74	Services and Commodities			No MWBE waiver requested
CL00339	UHY Advisors, Inc. DBA UHY Consulting, Inc.	11/17/2023-11/16/2026	\$ 47,700.00	Services			Insufficient subcontracting opportunities
L000036	Ramada Fund, Inc.	01/01/2024-12/31/2026	\$ 162,000.00	Commodities			Location impacted availability
C000587	Clare Monteau LLC	11/14/2023-11/13/2028	\$ 185,000.00	Services and Commodities			No MWBE waiver requested
CL00323	Ivans, a Division of Applied Systems Inc	01/01/2024-12/31/2028	\$ 649,457.00	Commodities			Insufficient subcontracting opportunities
D000183	Gilbert International Inc.	01/01/2024-12/31/2028	\$ 2,766,831.00	Services and Commodities			No MWBE waiver requested
PO 348945	Refinitiv US LLC DBA Refinitiv	09/13/2023-09/12/2024	\$ 76,080.00	Services			Other
PO 349065	SS&C Technologies, Inc	12/01/2023-08/31/2024	\$ 50,000.00	Services			Other
PO 349092	S&P Global Limited	11/01/2023-10/31/2024	\$ 40,000.00	Services			Other
PO 349094	S&P Global Limited	11/01/2023-10/31/2024	\$ 95,000.00	Services			Other
C000593	Raj Somas d/b/a/ RUSD Solutions	02/27/2024-02/26/2025	\$ 447,500.00	Services and Commodities			Lack of MWBE firms available
PO 349507	Hutton Health Consulting LLC	03/22/2024-03/21/2025	\$ 50,000.00	Services			Insufficient subcontracting opportunities
1000249	The Yield Book Inc	01/14/2024-01/13/2031	\$ 1,642,290.00	Services			No MWBE waiver requested
PO 349334	Katten Muchin Rosenman LLP	02/22/2024-Completion	\$ 49,000.00	Services			Insufficient subcontracting opportunities
	FactSet Research Systems Inc. DBA CUSIP Global						
PO 349416	Services	11/01/2023-10/31/2025	\$ 43,155.00	Services			Other
C000590	Ti Solution Inc	02/23/2024-02/22/2026	\$ 394,251.00	Services and Commodities			Other
C000594	CompuLink Technologies Inc.	02/06/2024-02/05/2025	57,623.14	Services and Commodities			Other
C000570	Radius Global Solutions LLC	07/01/2023-11/19/2030	\$ 5,260,000.00	Services			Specialized work/knowledge/equipment required
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