

**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: 3/1/2024

Agency Contact:

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Title: MWBE/SDVOB Compliance Specialist

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(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

Contract Number	Prime Contractor Name	Contract term dates	Contract Amount	(1) Description of Contract Scope	MWBE Certified Subcontractor Name	(1) Description of Subcontract scope	(2) Description of Approved Waiver
PO 347816	Compulink Technologies Inc	04/09/2023-04/08/2024	\$ 28,800.00	Services and Commodities			No MWBE waiver requested
PO 347989	TI Solution Inc	05/07/2023-05/06/2025	\$ 48,565.38	Services			MWBE bid(s) were too high compared to non-MWBE
CL00336	M. Davis and Company, Inc.	04/21/2023-04/20/2028	\$ 500,000.00	Services			No MWBE waiver requested
C000572	EisnerAmper LLP	10/01/2023-09/30/2028	\$ 4,357,025.00	Services			Insufficient subcontracting opportunities
PO 347868	BCA Reasearch Inc.	05/01/2023-04/30/2024	\$ 33,075.00	Services			Insufficient subcontracting opportunities
I000242	Attucks Asset Management LLC	04/22/2023-04/21/2030	TBD	Services			Insufficient subcontracting opportunities
I000235	CreditSights, Inc.	06/22/2023-06/21/2026	\$ 379,000.00	Services			Insufficient subcontracting opportunities
PO 348114	Oblong, Inc.	09/17/2023-09/16/2024	\$ 49,990.00	Services and Commodities			No MWBE waiver requested
I000245	Legato Capital Management, LLC	04/22/2023-04/21/2030	TBD	Services			Insufficient subcontracting opportunities
I000244	Leading Edge Investment Advisor, LLC	05/26/2023-05/25/2030	TBD	Services			Insufficient subcontracting opportunities
I000243	Bivium Capital Partners, LLC	05/26/2023-05/25/2030	TBD	Services			Insufficient subcontracting opportunities
PO 348185	ARLS Consultants Inc.	05/26/2023-05/25/2023	\$ 32,676.72	Services			Specialized work/knowledge/equipment required
I000248	Glass Lewis and Co, LLC	07/01/2023-06/30/2030	\$ 317,800.00	Services			Insufficient subcontracting opportunities
C000577	TI Solution Inc	06/13/2023-06/12/2024	\$ 181,797.96	Services and Commodities			Other
PO 348282	Wright Business Systems Inc.	10/04/2023-09/09/2024	\$ 38,880.00	Services and Commodities			No MWBE waiver requested
I000247	Mercer Investments, LLC	07/25/2023-07/24/2030	\$ 3,837,296.00	Services			Insufficient subcontracting opportunities
I000236	Blackrock Financial Management Inc	07/17/2023-07/16/2028	TBD	Services			Insufficient subcontracting opportunities
I000237	Goldman Sachs Asset Management LP (GSAM)	07/17/2023-07/16/2028	TBD	Services			Insufficient subcontracting opportunities
I000238	Invesco Advisers, Inc	07/17/2023-07/16/2028	TBD	Services			Insufficient subcontracting opportunities
I000241	Semper Capital Management LP	07/17/2023-07/16/2028	TBD	Services			Insufficient subcontracting opportunities
I000240	Pacific Investment Management Company LLC (PIMCO)	07/17/2023-07/16/2028	TBD	Services			Insufficient subcontracting opportunities
PO 347951	Thundercat Technology Inc	05/05/2023-05/04/2024	\$ 32,000.00	Commodities			MWBE firms were non responsive to solicitations
PO 348268	Reed Group Ltd	07/30/2023-07/29/2024	\$ 299,999.70	Commodities			Specialized work/knowledge/equipment required
PO 3477737	Optum360 LLC	03/01/2023-02/29/2024	\$ 46,000.00	Services			Insufficient subcontracting opportunities
C000581	TI Solution Inc.	05/08/2023-05/07/2025	\$ 97,866.55	Commodities			No MWBE waiver requested
D000182	Jones Lang Lasalle Brokerage, Inc	07/25/2023-07/24/2028	TBD	Services	-M-To-Pros Development, Inc -Manhattan Boutique Real Estate, INC	Services	No MWBE waiver requested
I000246	Blackrock Financial Management Inc	08/21/2023-08/20/2030	\$ 13,825,000.00	Services			Insufficient subcontracting opportunities
I000239	Loomis, Sayles & Company. LP	08/25/2023-08/24/2028	TBD	Services			Insufficient subcontracting opportunities
C000582	K Systems Solutions LLC	09/05/2023-09/04/2026	\$ 256,886.76	Commodities			No MWBE waiver requested
C000583	CompCiti Business Solutions, Inc.	09/21/2023-09/20/2024	\$ 83,980.00	Commodities			No MWBE waiver requested
PO 348338	Diligent Corporation	07/03/2023-07/02/2027	\$ 46,485.34	Commodities			Specialized work/knowledge/equipment required
PO 348247	CompuLink Technologies	06/09/2023-06/08/2024	\$ 29,957.76	Commodities			No MWBE waiver requested
PO 348229	K Systems Solutions LLC	08/01/2023-07/31/2024	\$ 33,597.60	Services and Commodities			No MWBE waiver requested
C000580	27 Solutions Inc	09/16/2023-09/15/2024	\$ 344,345.00	Services and Commodities			No MWBE waiver requested
PO 348159	Ballard Spahr	Until Completion	\$ 49,999.00	Services			Insufficient subcontracting opportunities

Contract Number	Prime Contractor Name	Contract term dates	Contract Amount	(1) Description of Contract Scope	MWBE Certified Subcontractor Name	(1) Description of 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
L000339	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