

Amendment 1 to

**Request for Proposal ETC0003
Benefits Administration System
for the Department of Employee Trust Funds
Wisconsin Retirement System**



Issued by the State of Wisconsin
Department of Employee Trust Funds

Release Date: July 9, 2013

AMENDMENT 1

The two pages that follow replace pages 317 and 320 of ETF's Request for Proposal ETC0003 for a Benefits Administration System for the Department of Employee Trust Funds Wisconsin Retirement System.

The added language (intended to clarify the scoring of features and/or functional items excluded from the vendor's core bid due to budgetary limitations, described in Tab B-1.3 of the vendor's Technical Proposal, and costed in Schedule 10 of the vendor's Cost Proposal) on each of the pages has been left in red so that the reader can readily discern the altered language.

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Adherence to and consistency with the work plan are considered critical acceptance criteria for any phase.

The vendor should bear in mind the specific terms and conditions presented in Section D when preparing its cost schedules. In addition, ETF provides the following reminders:

- n Vendors must include in the cost proposal a summary, by staff position, of the number of hours and the hourly rate for all contractor support services included in the proposal.
- n The vendor must include its “D-U-N-S[®]” (Dun and Bradstreet) number on the cover page of the proposal.
- n Vendor’s cost information will be evaluated on the basis of its consistency with the information provided in the vendor’s technical proposal. All calculations in vendor’s cost schedules will be verified for correctness.
- n Although the lowest overall price may not necessarily be the primary determining factor for award, ETF shall make every effort to substantiate prices for those products and services the vendor will supply to ensure that those prices are considered fair and reasonable.
- n Any proposal that does not meet the requirements outlined in Section C.1 and in the points above, or for which a fixed-dollar proposal amount cannot be precisely determined may be considered a non-responsive proposal and may be rejected by ETF.

Although it is understood that many project deliverables will be submitted to ETF by the selected vendor, only 14¹⁷ payments will be made under the contract to be awarded. Each payment will be tied to one of the **14 contractual deliverable payment points** as defined by ETF in Table 4 Proposed Payment Schedule. Invoices for the 14 contractual deliverables may be rendered only after each deliverable has been completed and formally accepted by ETF.

For terms relating to invoicing and payments, please refer to Section A.3.7 Invoicing, Payments, Holdbacks, and Tracking Thereof.

Schedules for presenting the vendor’s cost bid are provided on the following pages. Vendors should add line items to the cost schedules as necessary to include all project costs and suitable breakdowns. The Excel spreadsheets are provided as a single Excel workbook at the extranet site on which the RFP is posted. All subtotals and totals will be computed automatically.

Following is a list of the cost schedules that must be completed and a description of the information to be provided in each:

ETF BID SUMMARY

On this worksheet, fill in the vendor name. All other entries will be automatically populated based on the vendor entries in Schedules 1 through 9. The cell highlighted in dark red in the enclosed partial spreadsheet (Figure 20 Partial View of ETF Bid Summary row: TOTAL – Functional) **plus the total cost of items listed as exclusions in Schedule 10** are the cost amount that will be used as the cost basis of award (see Table 3 Proposal Evaluation Criteria).

¹⁷ Depending on the number of functional rollouts this number may increase or decrease.

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SCHEDULE 9 – COST ESTIMATE BY PROJECT PHASE

Enter cost figures for the project phases assuming mandatory project elements only. The first three preliminary phases have been defined in the RFP. Vendors should add the functional rollout phases they propose and enter costs accordingly. Please note that the total of Schedule 9 should be equal to the total of Schedule 1.

SCHEDULE 10 – COST OF REQUIREMENTS DROPPED DUE TO BUDGETARY LIMITATIONS

This schedule provides the vendor with a location to list the costs associated with the development of those requirements that the vendor decided to drop from the project in order to meet the budgetary amount specified in Section A.3.6. These costs are not carried forward into the Bid Summary **but are factored into the cost score as described above (on page 317) in “ETF Bid Summary.”**

SCHEDULE 11 – COST OF SUGGESTED OPPORTUNITIES FOR DISTINCTION

This schedule provides the vendor with a location to present the cost associated with any of the vendor-proposed opportunities for distinction that are a departure from the requirements that are listed in the RFP. These costs are not carried forward into the Bid Summary.

The cost proposal worksheets are presented in picture format on the following pages for information purposes only. Vendors must use the accompanying Excel workbook for compiling and submitting their bids.