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| ETF_logo_large | STATE OF WISCONSIN **Department of Employee Trust Funds**  **Robert J. Conlin**  SECRETARY | 4822 Madison Yards Way  Madison, WI 53705-9100  P. O. Box 7931  Madison, WI 53707-7931  http://etf.wi.gov |

Date: January 9, 2020

To: All Potential Proposers to ETF RFP ETJ0048

RE: **Addendum No. 1 to Request for Proposals (RFP) ETJ0048 – Business Process Management and Strategic Mapping Consulting Services**

**Acknowledgement of receipt of this Addendum No. 1:**

**Proposers must acknowledge receipt of this Addendum No. 1 by providing the required information in the box below and including this Page 1 in the Tab 1 section of their Proposal.**

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| Proposer’s Company Name: |  |
|  |  |
| Authorized Person (Printed Name and Title): |  |
|  |  |
| Authorized Person’s Signature: |  |
|  | Date |

**Please note the following updates to RFP ETH0052-54:**

**1.** **ADD** to the RFP the following vendor questions regarding RFP ETJ0048 and answers from the Department:

**ETJ0048 Business Process Management and Strategic Mapping Consulting Services**

**Vendor Questions / Department Answers**

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| --- | --- | --- | --- | --- |
| **Q#** | **RFP/Attachment/Section** | **Page#** | **Proposer Question/Rationale** | **Department Answer** |
| **1** | Appendix 2 sections 1.0 & 1.5 | 4, 10 | Please clarify the expected project schedule to be used for all services? (Section 1.0 states two years with a June to July annual cycle and section 1.5 states four years with a January to December cycle. | The schedule of the engagement will be determined jointly by the Department and the Contractor once the contract is executed. Appendix 2, Section 1.0 lists the fiscal years in which the services will be provided. Appendix 2, Section 1.5 lists the expected project schedule for delivery of the services. The timeframes referenced in RFP Section 1.10 reflect the initial term of the contract and optional renewal periods. Use the estimated schedule for the provision of the services in Appendix 2, Section 1.10. |
| **2** | Appendix 1 section 1.0 question 1.2 | 1 | Please explain why must the proposer have 10 years experience conducting all of the requested services with Public Pension Funds? | The Department asks for this level of relative government pension experience due to the unique nuances of large public pension funds, and legislative and regulatory issues that are differentiators from public sector and other health and financial industries. |
| **3** |  |  | If the proposer have 10 years experience conducting all of the requested services with Public Pension Funds, will they be disqualified? | The Department assumes the vendor meant to write “If the proposer does not have 10 years of experience conducting all of the requested services with public pension funds, will they be disqualified?” The Department’s answer to that question is Yes. |
| **4** |  |  | Please explain why there is no minority participation requirements? | See RFP Appendix 3, Department Terms and Conditions, Section 2.0, Compliance with Contract and Applicable Law. If this does not answer your question, please provide more explanation on what you mean by “minority participation requirements.” |
| **5** |  |  | Please explain why there wasn't a prebid conference? | Pre-bid conferences are not required, and the Department doesn’t normally hold them. The Department believes the vendor question submission procedure eliminates the need for vendor pre-bid conferences. |
| **6** |  | Forms A - G | Is a typed signature acceptable? The forms are locked and only allow typed names. | Yes, however, you can copy and paste a .pdf or .bmp file signature into the text box. |
| **7** |  |  | Is the company who assisted in writing the RFP precluded from responding to this RFP? | No company assisted the Department in drafting the RFP. |
| **8** | Appendix 1.3 | 2 | Are non-audited financial statements acceptable? | Yes. |
| **9** | Appendix 1 – General Questionnaire, Section 1.2 | 1,2 | Would ETF consider adjusting the language from “Proposer must have at least 10 years of experience conducting all of the following with public pension funds” to “Proposer must have at least 10 years of experience conducting the following with public pension funds, financial services organizations, and financial regulatory entities” in order to incorporate experience and lessons learned from a broader set of clients? | No. |
| **10** | RFP General |  | Are there any new updates (after 6/29/2017) to ETF Reports to Joint Committee on Finance? | No. The Department takes action on legislative requests and issues that affect the Wisconsin Retirement System and other ETF-administered programs. Updates are published on the Department’s website: <https://etf.wi.gov/about-etf/government-relations/action-items>  Also see: <https://etf.wi.gov/news/legislative-update> |
| **11** | RFP General |  | Is there an update to the 7/21/2018 ETF Strategic Plan | On June 20, 2019 the Department presented the Strategic Plan annual update at a joint meeting of the Department’s governing Boards:  <https://etf.wi.gov/boards/joint/2019/06/20/item3b/direct> |
| **12** | RFP General |  | Has this effort been ID’d within the current ETF Biennium Budget? What is the expected budget amount for this project? | There is funding for this work within the current budget that runs through June 30, 2020. It is expected that additional funding will be allocated for subsequent fiscal years. Specifics of that budget will be discussed with the vendor once the contract is executed. |
| **13** | Appendix 3, General |  | Would ETF consider adding the following provision to any resultant contract: *Except to the extent finally determined to be prohibited by law, Contractor’s aggregate liability for all claims, losses, liabilities, or damages in connection with this agreement or its subject matter, whether as a result of breach of contract, tort (including negligence), or otherwise, regardless of the theory of liability asserted, is limited to no more than the total amount of fees paid to Contractor for the particular Service giving rise to the liability under this agreement. In addition, Contractor will not be liable for any lost profits, consequential, indirect, punitive, exemplary, or special damages. Also, Contractor shall have no liability arising from or relating to any third-party hardware, software, information, or materials selected or supplied by the Department.* | No. The suggested provision equates to a change to Section 18.0, Remedies of the Department, and Section 23.0, Indemnification, of RFP Appendix 3, Department Terms and Conditions, which are included in Table 4 of RFP Section 2.4.2. No assumptions or exceptions are allowed to the sections listed in Table 4. |

END

This Addendum will be available on ETF’s Extranet at <http://etfextranet.it.state.wi.us/etf/internet/RFP/rfp.html>.