



Contract

Commodity or Service: Request for Bid for the State of Wisconsin Department of Employee Trust Funds Project Management and Associated Services for the Wisconsin Retirement System (WRS) **Request for Bid/Proposal No:** ETA0017 Amendment #5
GL Insight LLC

Contract Period: January 1, 2012 through December 31, 2013

1. This contract is entered into by and between the State of Wisconsin, Department of Employee Trust Funds, and the contractor whose name, address, and principal officer appears below;
2. Whereby the Department of Employee Trust Funds, agrees to direct the purchase and the contractor agrees to supply the contract requirements cited above in accordance with the terms and conditions of the request for bid cited above, and in accordance with the contractor's bid submitted on this request for bid; which request for bid is hereby made a part of this contract;
3. In connection with the performance of work under this contract, the contractor agrees not to discriminate against any employees or applicant for employment because of age, race, religion, color, handicap, sex, physical condition, developmental disability as defined in s.51.01(5), Wis. Stats., sexual orientation as defined in s.111.32(13m), Wis. Stats., or national origin. This provision shall include, but not be limited to, the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. Except with respect to sexual orientation, the contractor further agrees to take affirmative action to ensure equal employment opportunities. The contractor agrees to post in conspicuous places, available for employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of the nondiscrimination clause.
4. Contracts estimated to be over twenty-five thousand dollars (\$25,000) require the submission of a written affirmative action plan. Contractors with an annual work force of less than twenty-five (25) employees are exempted from this requirement.

Within fifteen (15) working days after the award of the contract, the plan shall be submitted for approval to the contracting agency. Technical assistance regarding this clause is provided by the Wisconsin Office of Contract Compliance, Department of Administration, P.O. Box 7867, Madison, WI 53707-7867, (608) 266-5462.
5. The order of precedence is: the official purchase order; this contract / Amendment 1; Request for Bid (RFB) ETA0017 November 19, 2010 (including all appendices and amendments); and GL Insights LLC's response to RFB dated December 3, 2010.
6. The Amendment # 2 and one exhibit to this Amendment, modify Amendment # 1. Amendment # 2 Exhibit 1 Business Analyst Position Contract ETA0017 dated 02/28/2011. All other provisions of this contract unrelated to this Amendment remain in effect.
7. The Amendment #3 is for one full-time business analyst contact position beginning April 25, 2011 at the rate of \$85.00 an hour for up to 870 hours. All other provisions of this contract unrelated to this Amendment remain in effect.
8. The Amendment #4 includes one full-time project manager, effective August 8, 2011, at the rate of \$110.00 a hour not to exceed 2000 hours. In addition, Amendment #4 includes one full-time business analyst position to work on the Enterprise Information Model: Phase 2 use Case Models. The business analyst is effective September 1, 2011, at the rate of \$110.00 a hour not to exceed 1,000 hours. All other provisions of this contract unrelated to this Amendment remain in effect.
9. The Amendment # 5 extends the contract for two years, January 1, 2012 through December 31, 2013, Attachment 1-3 dated October 6, 2011 Cost Proposal Worksheet – ETA0017-REVISION 2, and Attachment 2 Summary of Services dated October 25, 2011. All other provisions of this contract unrelated to this Amendment remain in effect.

This document can be made available in accessible formats to qualified individuals with disabilities.

Contract Number: ETA0017 Request for Bid for the State of Wisconsin Department of Employee Trust Funds Project Management and Associated Services for the Wisconsin Retirement System (WRS)

State of Wisconsin Department of Administration Department of Employee Trust Funds	
By (Name) Robert J. Conlin	
Signature 	
Title Deputy Secretary	
Phone (608) 261-7940	bob.conlin@etf.wi.us
Date (MM/DD/CCYY) 10/24/2011	

To be Completed by Contractor	
Company Name GL Insight LLC	
Company Address (City, State, Zip) 23 Hidden Trl. Jackson, MI 49203	
By (Name) Linda H. Hall	
Signature 	
Title Chief Executive Officer	

Cost Proposal Worksheet – ETA0017-REVISION 2
 Updated to reflect 2012 calendar year rates and new service offerings

Vendor Name: GL Insight LLC

Authorized Signature: _____

Linda A. Hall

Date: October 6, 2011

The costs provided below will be based on Section B –Bidder Qualifications and Appendix B within this RFB, except where noted below.

Optional Services:

Position	Years of Public Retirement System Experience	Hourly Rate or Range	Other costs. Please itemize ¹ . Summary Responsibilities ²
Project Portfolio Manager	6+ years	\$152.25	Linda Hall hourly rate for 2012 is \$156.48
Project Portfolio Manager	3-5 years	\$105.00	
Project Portfolio Manager	1-3 years	\$84.00	
Business Analyst	6+ years	\$115.50	
Business Analyst	3-5 years	\$105.00	
Business Analyst	1-3 years	\$84.00	
Quality Assurance/Tester	6+ years	63.00	
Quality Assurance Tester	3-5 years	\$52.50	
Quality Assurance Tester	1-3 years	\$42.00	
Other services		\$57.75	
Quality Manager	6+ years	\$152.25	\$183.75 Prepares quality management plan, oversees quality control, establishes project standards, measurements and metrics, reviews deliverables; oversees quality management programs.

¹ For all optional services, travel to sites other than the Badger Road and Rimrock Road locations that is requested by ETF will be billed directly to ETF. Attendance at any seminar, conference or other outside session requested by ETF will be billed directly to ETF.
² More details available upon request.

Position	Years of Public Retirement System Experience	Hourly Rate or Range		Other costs. Please itemize. ¹ Summary Responsibilities ²
Quality Manager	3-5 years	\$125.00	\$141.75	Prepares quality management plan, oversees quality control, establishes project standards, measurements and metrics; reviews deliverables.
Quality Manager	1-3 years	\$105.00	\$130.00	Assists with quality management plan, conducts quality control; assists with the development of project standards, measurements, and metrics; reviews deliverables.
Technical Writer	3-5 years	\$57.75	\$68.25	Synthesizes analytical data into comprehensive documentation and/or reports appropriate for defined audiences.
Technical Writer	1-3 years	\$47.25	\$65.25	Assists in preparing documentation and/or reports utilizing data gathered by project participants.
Business/ Enterprise Architect	6+ years	\$160.00	\$190.00	Analyzes the structure of the enterprise including governance, business processes, and business information and uses this information to help align strategic goals and objectives with decisions regarding products and services; partners and suppliers; organization; capabilities; and key business and IT initiatives. Works to develop an integrated view of the enterprise using a repeatable approach, cohesive framework, and available industry standard techniques.

Financial Stability Document -

Will provide upon request: Yes No

Summary of services from Linda Hall to continue the improvement of ETF's project management methodology:

A. Enhance Project Management Methodology Development, Training, and Operational Oversight:

- Project Manager Certification Program – ETF staff with an interest and aptitude for project management are trained to take on project manager roles for selected business projects
 - Potential Deliverables:
 - Training Program designed to teach project management basics
 - Individuals Certified as “Departmental Project Managers”
- Project Resource Allocation Strategies and Tracking – add resource allocation and tracking capabilities to project management artifacts
 - Potential Deliverables:
 - Resource usage statistics by project category
 - Resource usage metrics to improve estimates
- Project Risk Management and Quality Assurance (QA) – Develop a basic risk management program to be integrated into project management methods. Develop basic QA standards to be applied to project management processes
 - Potential Deliverables:
 - Risk management service provided to ongoing projects
 - Quality assurance operational and domain standards
- Project Budget and Cost Development and Management – integration of budget and cost information into project standards and integration of tracking metrics for earned value
 - Program to develop project cost models
 - Budget development methods
 - Cost tracking methods and metrics
 - Earned value reports
- Project Management Support and Oversight – expert advice and counsel provided to project managers
 - Potential Deliverables:
 - Subject matter expertise on process, methods and deliverables
 - Portfolio management and project governance methods and procedures
 - Oversight for Project Management Office Tools initiative (PR-73)

B. Value Stream Mapping of Business Processes

Value stream mapping helps business improve processed by identifying a target service, mapping the current state of that service and evaluating the steps the process for its value to the service.

- Potential Deliverables:
 - Target process value stream maps
 - Target process desired state
 - Target process plan to achieve desired state

C. Facilitation

Facilitation supports the achievement of meeting/group objectives and provides a neutral voice to help groups meet consensus.

- Potential Deliverables
 - Meeting facilitation
 - Meeting notes, records, action item, and decision records

D. Other Services

ETF may request other related services which can be provided through mutual agreement.