State of Wisconsin
Department of Employee Trust Funds
DOA-3049 (R01/2000))
S. 51.01(5) Wis. Stats.; s. 111.32(13m) Wis. Stats.

Department of Employee Trust Funds
801 W. Badger Road
P. O. Box 7931
Madison, WI 53707-7931

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 8

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.

10. The business analyst identified in Amendment 3, has ended effective September 2, 2011.

11. The Amendment 6 includes one full-time project manager, effective November 21, 2011, at the rate of $110.00 per hour not to exceed 2000 hours. The project manager identified in Amendment 4, has an end date of November 30, 2011. All other provisions of this contract unrelated to this Amendment remain in effect.

12. Amendment 7 includes one full-time project manager, effective January 9, 2012, at the rate of $115.00 per hour not to exceed 2000 hours. All other provisions of this contract unrelated to this Amendment remain in effect.

13. Amendment 8 extends Amendment #4 per Attachment 1: PR-117 Enterprise Business Model (EBM/EIM) Business Analyst Services Revised Statement of Work dated February 6, 2012) at a rate of $115.00 per hour not to exceed 3500 hours. 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)

Request for Bid/Proposal: ETA0017 Amendment 8.

GL Insight LLC

State of Wisconsin Department of Administration Department of Employee Trust Funds	To be Completed by Contractor
By *(Name)* Robert J. Marchant	Company Name GL Insight LLC
Signature	Company Address *(City, State, Zip)* 23 Hidden Trl. Jackson, MI 49203
Title Deputy Secretary	By *(Name)* Linda H. Hall
Phone 608/266-9854 robert.marchant@etf.state.wi.us	Signature Linda H. Hall
Date *(MM/DD/CCYY)* 2-16-12	Title Chief Executive Officer

GL Insight LLC New Perspectives

PR-117 Enterprise Business Model (EIM/EBM)

Business Analyst Services Revised Statement of Work

PR-117 Enterprise Business Model (EIM/EBM) is the second phase of a project that was initiated as an Enterprise Information Model (EIM) in support of overall Employee Trust Funds (ETF) strategic goals. Phase 1 conducted from May through September of 2011 identified ETF's high-level objects. Phase 2 was originally designed to identify only Departmental Use Cases within the agency. This Statement of Work (SOW) describes revised services requested by ETF.

Contents of this revision reflect changes only. All other information in the original SOW, effective April 25, 2011 remains in effect.

1. General Statement of Revised Phase 2 Responsibilities

   Beginning with Retirement Estimates and Retirement Application within Retirement Services, for each Business Function:

ACTIVITY (Activities 1 and 2 will iterate)	DELIVERABLE	SAMPLE
1. Document use cases identifying objects used, required business functionality, and associated business rules	Use Cases and Business Rules	Attachment 1: Scenarios of the Retirement Benefits Process. Attachment 2: Activity Diagram Attachment 3: Use Case Narrative Attachment 4: Sample Business Rule
2. Prepare Object Model	Object Model with Functionality and Data Attributes	Attachment 5: Sample Object Model (Class Diagram)
3. Prepare Composite Object Model	Composite Object Model (Class Diagram)	

When the specified processes within Retirement Services are completed, the next process to be analyzed will be determined by the Project Sponsor using such criteria as highest transaction work, highest transaction volume and support for leading or lagging indicators. Once selected, the actions above will be repeated for the business process. Documentation of all high volume, high effort, complex or ETF unique processes should be completed by the target date identified in the Project Charter.

Functional Duties

a. Tasks

   1. Review, analyze, and evaluate business processes and user needs.
   2. Apply industry standards and current and emerging modeling technologies to the business processes.
   3. Analyze existing (as-is) systems and procedures by examining business functions and processes, information flow, and business systems as they relate to the use of data, business rules and functionality in the organization.
   4. Gather data through interview, survey, and on-site observation, working within the organization and with external customer and third-party administrators if needed.
   5. Facilitate sessions to define, document, and validate business data.

b. Deliverables[1]

PR-117-2.1. Use Cases and Business Rules

PR-117-2.2. Object Model with Functionality and Data Attributes (Listing)

PR-117-2.3. Composite Object Model (Class Diagram)

c. Communications

1. Provide input to the EBM Project manager regarding project management activities. Communicate at least weekly with the EBM Project Manager and discuss all concern areas with that individual.

2. Administrative Duties (in re: GL Insight)

1. Capture time expended on a daily basis and electronically submit the GL Insight (GLI) Weekly Timesheet by COB each Saturday (earlier if no work is planned for Saturday) during the contract period.
2. Track hours expended against the total time allocated for this project. Total time allocated for this SOW is 2000 hours. This total is not to be exceeded without ETF/GLI authorization.
3. Communicate with the GLI manager as needed.
4. Ensure that only the activities identified in this SOW are conducted. Any other activities to be conducted must be authorized in writing by ETF/GLI.

WI Department of Employee Trust Funds	GL Insight, LLC
[signature]	Linda H. Hall
Robert R. Marchant, Deputy Secretary	Linda H. Hall, CEO
Print Name/Title	Print Name/Title
2-16-12	2/6/2012
Date	Date

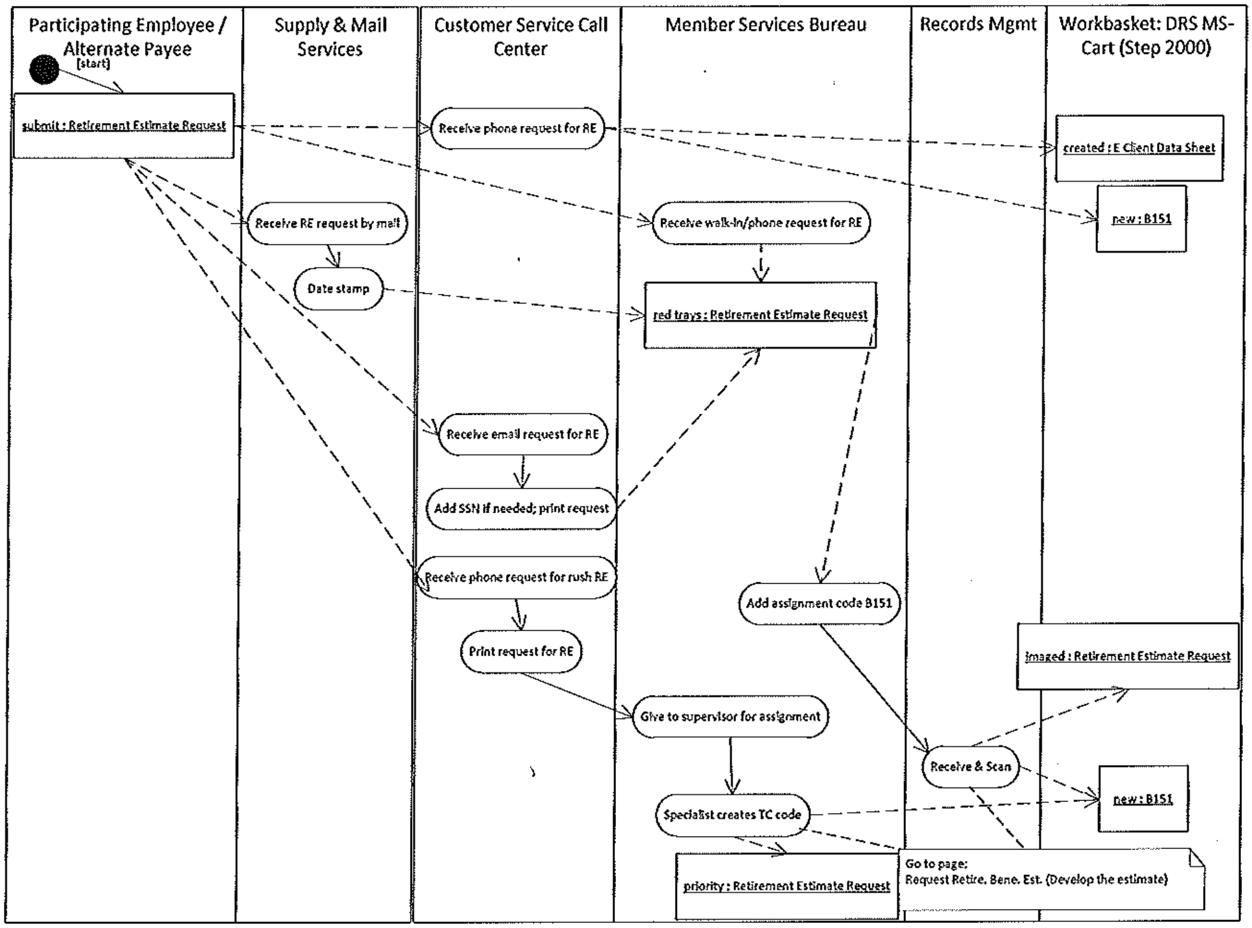
[1] Deliverables 1 and 2 will be iterated for each selected business process. Deliverable 3 is the final composite model depicted in the form of a Class Diagram.

Attachment 1: Scenarios of the Retirement Benefits Process

Member Requests Retirement Benefit Estimate (B151)
Member Applies for Retirement Benefits (B152 and B952)
Member Applies for Separation Benefits (B208)
Member Cancels Retirement Annuity Election
Member Purchases Service
Member Enrolls in Deferred Compensation
Member Maintains Insurance Enrollments during Retirement
Member Elects (or Cancels) Variable Trust Fund Participation (B190 – B193)
Alternate Payee files a QDRO (P800)
Named Survivor or Other Party Notifies ETF of Death of Annuitant (B165)
Named Survivor Dies
Employer Enrolls Employee in WRS
Employer Notifies WRS of Employee Termination
Employer Transfers Funds to WRS
3rd Party Requests Verification of Member Pension (B207)
Will also include Alternate scenarios not yet discovered and exception scenarios not listed.

GL Insight LLC
New Perspectives

Attachment 2: Activity Diagram



Attachment 3: Use Case Narrative

Business Use Case Scenario Details for: Request a Retirement Benefit Estimate

Post-conditions: Retirement Estimate Packet sent, or Separation Packet sent, or Request for Missing Information letter sent, or Too Early Letter sent.

Actor	**Action Performed**
Member / Alternate Payee	Submits request for estimate
ETF: (Mail and Supply Services, Customer Service Call Center, Member Services Bureau)	Receive request Log request
Member Services Bureau (MSB)	Batch non-rush requests and send batch to Records Management. Assign rush requests to a specialist in MSB w/o scanning.
Records Management	Scan and index the request.
Member Services Bureau (MSB)	Begin new request for an estimate Determine if there is missing information. If so, send Missing Information Letter to member. See Business Rule (BR) 1. Determine if member is vested. If not, send Separation packet. See BR 2. Determine if member is requesting estimate too early. If so, send Too Early Letter. See BR 3. Process the request.
WEBS	Calculate retirement benefit estimate. Business Calculation (BC) 1 WEBS' displays the estimate details or message the estimate must be calculated manually. See Software Constraint (SC) 1.
Member Services Bureau (MSB)	Determine if calculation needs to be overridden. See SC 2. Send Retirement Estimate Packet to member. Create history for request.

Attachment 3: Sample Business Rule

Business Rule No.	Business Rule Name	Business Rule Details
BR 1	Estimate Request Information	Following information must be specified on the request: TBD
BR 2	Check for vesting	Three vesting rules are: 1. Covered under WRS before 1990, automatically vested. 2. Began coverage under WRS after 1989 and last termination date from covered WRS employment is before April 24, 1998, then vested if some creditable service in at least five calendar years to be vested. 3. Covered WRS service after April 24, 1998, automatically vested.
BR 3	Check for timely retirement request	When this rule is enforced, MSB sends requestor a rejection letter, <u>Too Early Letter</u>, instructing the member to use a website calculator as their estimated retirement date is more than 12 months in the future, or to re-apply on date MM/DD/YYYY.

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Attachment 4: Sample Object Model (Class Diagram)