

# **District of Columbia Retirement Board (DCRB)**

Request for Proposals for Consulting Assistance in the  
Acquisition of a Pension Information System

**Release Date: September 27, 2010**



**Eric Stanchfield, Executive Director**  
900 7<sup>th</sup> Street, N.W. Second Floor, Washington, DC 20001

**District of Columbia Retirement Board**

**Request for Proposals for Consulting Assistance in the Acquisition  
of a Pension Information System**

**Executive Summary  
(Please Limit Response to One Page)**

Firm Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone  
Number: \_\_\_\_\_

Contact  
Person: \_\_\_\_\_

Email: \_\_\_\_\_

Team: \_\_\_\_\_

Why should the District of Columbia Retirement Board retain your consulting firm to provide the services described in this RFP? Please summarize your consulting firm's strengths and weaknesses in the space provided.

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## A. OVERVIEW

The District of Columbia Retirement Board (DCRB), an independent District of Columbia government agency, is a retirement system that manages assets in excess of \$4 billion for the District of Columbia Teachers' Retirement Fund and the District of Columbia Police Officers and Firefighters' Retirement Fund (the "Funds") on an actuarially sound basis and administers retirement and post-employment benefit programs for participants and beneficiaries of those Funds. The DCRB works closely with various external agencies in administering retirement benefits and disbursements, most notably the U.S. Department of the Treasury's Office of D.C. Pensions (ODCP) in conjunction with the Treasury Department's Bureau of Public Debt (BPD), as well as the District of Columbia Government human resources and payroll departments for the DCRB plan participants.

DCRB is comprised of approximately 45 employees who provide services to approximately 24,000 active and retired plan participants. In recent years, DCRB has begun planning for future benefits administration services that revolve around the acquisition of a pension information system. An RFP has been drafted for the proposed pension information system

Included in the acquisition is the need for project management services related to the procurement of a pension information system and associated projects such as creating a plan to ensure usability of active member data reclamation project, benefit file scanning and indexing, and the development of a core team for successful project implementation.

## B. SCOPE OF SERVICES

DCRB is seeking a consultant to review, analyze, and edit an RFP for the acquisition of a pension information system. In addition, DCRB seeks a firm to provide onsite expert assistance to co-manage a project team and assist in project team development, assist in the new pension information system vendor selection, and provide project management oversight and development for the pension information system for the duration of the project. **DCRB may award individual items or the entire proposal to one vendor.** *The vendor selected to perform services under this RFP cannot be considered nor selected as the final vendor to perform services as the systems integrator of the pension information system.* Below are the expected tasks and deliverables.

### A. Pension Information System Review and Technical Assistance

1. **RFP Review and Completion** – DCRB has drafted an RFP for the proposed pension information system. DCRB needs Consultant to review the RFP, and assess certain provisions, including: timetables, deliverables, vendor assessment methodology, stakeholder responsibilities, risks, information technology requirements, inventory of data sources, precise descriptions of benefit calculations, and documentation of downstream data, imaging, evaluation criteria, and scanning mechanisms for future pension information system systems. The expected outcome is a clearly drafted RFP that would be available for public distribution.

2. **Project Team Development** – The consultant will assist DCRB in developing an internal and external project team capable of securing a capable vendor and subsequently executing the major efforts related to the implementation of a pension information system. The consultant shall assist DCRB in retaining project management services for the duration of the project, identify project sponsors and necessary subject matter experts, define roles of the project team, and estimate time commitments for the various elements of the project. This work includes identifying DCRB staffing and backfill needs, necessary training/cross training, and solution recommendations.
3. **Assist in Pension Information System Vendor Selection** – Consultant shall assist in the evaluation of an appropriate pension information system for the DCRB plans. The Consultant will work with DCRB from the solicitation over the acquisition stages. This task will include: develop product demonstration scenarios; provide guidance and assistance in conducting a pre-proposal conference and in answering vendors' questions; assist DCRB staff in managing and controlling both inflow of proposals and outflow of DCRB information; assist DCRB with technical evaluations; conduct demonstrations and recommend site visits; and produce a cost/benefit analysis of final vendors. During the final stages of vendor selection, the Consultant shall provide advice and technical assistance in final vendor selection and contract formation.
4. **Project Management Oversight for Pension Information System** – To plan and implement a quality defined benefit system will require several years. DCRB solicits expertise from consultants who have undergone a transition from paper-based processes to a fully automated pension system. DCRB requires consulting expertise in project management and analysis throughout the project. In collaboration with DCRB identified project manager, the consultant will participate in the management of this project. The Consultant shall train the implementation team, participate in project meetings and planning activities, assist in developing system requirements, and test the developed system. During the project, the Consultant will identify risks to the project, review technical work of the systems integrator, develop work plans to address risk and project issues, and continue to resolve data integrity and acquisition issues. For effective project management, the Consultant should be available on-site at least four days a week to participate in project teams, review deliverables, train and advise DCRB staff, produce status reports, and work with the systems integrator vendor and DCRB to complete the project on time and within budget. The consultant is expected to maintain project plans, schedules, reports, resource allocations, risk and other associated documents in DCRB's enterprise project management (EPM) system.

#### **B. Ancillary Consulting Services:**

1. **Review Imaging and Indexing Process** – DCRB digitized approximately 3.4 million images of retiree records utilizing FileNet and Kofax systems. FileNet and Kofax authorized vendors are currently working with DCRB to develop electronic workflow processes for its core business and to correct and automate the indexing, validation, and verification programs and processes in Kofax. The consultant will audit/quality check the current scanning/indexing processes, develop sampling methodology to reduce errors,

develop processes and controls for future scanning/indexing, including data transformation, and train necessary staff. Further, the consultant will present a plan on how to coordinate access to other agency records and DCRB data.

2. **Create a Plan for Data Reclamation/Cleansing** – DCRB is working with the human resources/payroll departments in District government to gather and verify historical data (i.e., purchase of service, salary history, contribution history, breaks in service, beneficiary information) to ensure quality data for the correct calculation of benefits and proper administration in the pension information system. In the District, a multitude of data systems such as CAPS, UPPS, MUPPS, and PeopleSoft, along with the hard copy documents found in the official personnel folders, hold the necessary information DCRB requires for retirement processing. The consultant shall assist in training and guiding internal project staff on the best methods to collect accurate data, develop electronic resources (databases, scanned information, etc.), quality assurance, and error checking, and cleansing employee records of active Police Department, Fire Department, and Public School members. The consultant will create a plan for data reclamation/cleansing that will result in useable and retrievable information for the DCRB pension information system.

**Pension Information System Review and Technical Assistance:**

<b>Task Items:</b>	<b>Deadline</b>
1. RFP Review and Completion	November 23, 2010
2. Project Team Development	November 26, 2010
3. Assist in Pension Information System Vendor Selection	February 7, 2011
4. Project Management Oversight for Pension Information System	Unknown- Duration of Contract Term

**Ancillary Consulting Services:**

<b>Task Items:</b>	<b>Deadline</b>
1. Review Imaging and Indexing Process	November 15, 2010
2. Create a Plan for Data Reclamation & Cleansing	December 6, 2010

**Attached for reference only is a *Sample Project Plan Schedule*. Attachment A is a sample schedule that illustrates the minimum level of detail that DCRB expects.**

**C. MINIMUM QUALIFICATIONS AND PROPOSAL REQUIREMENTS**

Proposals should be as succinct as possible while providing an accurate picture of the firm’s ability to meet the needs of DCRB in a thorough, accurate, responsive and cost-effective manner. Each proposal must contain the following elements:

*Transmittal Letter and Minimum Qualifications*

Within the transmittal letter, the proposing firm must include the following:

- 1) The history of your organization in terms of the type of services provided. Include the description of services, volume of services, recent client reference list (from past 2 years, minimum of 4 clients) and attached client evaluations. In relation to each client listed as a reference, provide: a) the contact name, b) phone number, c) the number of pension information systems that your firm has successfully implemented, and d) the content of your firm's role.
- 2) Your organization's specific ability to provide the pension information system procurement assistance, data imaging, data reclamation, and project oversight services for the pension information system implementation. Please outline your firm's ability to meet the specific needs of this RFP.

#### *Understanding of the Services Needed*

In this section, describe your understanding of the services covered by this RFP. Please provide information, regarding your firm's approach and methodology to the scope of work outlined in the RFP. DCRB would also like a description of what we can expect in terms of onsite project management at DCRB's worksite and support staff time commitments.

#### *Professional Staff*

In this section, describe the experience of the individuals who will be assigned to the DCRB account. Provide a resume for each member of your firm and describe what role they will provide for this project.

#### *Firm History and Operations*

Please address the following questions regarding your firm:

1. How many years has the firm provided the services requested in this RFP?
2. Please identify the location of the primary office that will provide services for DCRB.
3. Describe the ownership structure of the firm, including the relationships of each branch office to the branch offices and to the headquarters. Identify the individual who has overall responsibility for the firm's operations. Please disclose any conflicts of interest that may exist in performing services for DCRB.
4. Describe the financial health of the firm including any outstanding cases or judgments against the firm for consulting work performed.

#### *References*

List three public employee clients for whom the firm has provided consulting services in pension system acquisition and project management within the past two years. For each reference listed, include client name, address, and telephone number and name of a contact person. Please state those clients who have worked with the specific project managers and staff who will be assigned DCRB as a client.

## *Technology Innovations*

List cases where the consultant's suggested use of technology enabled clients to automate, streamline, and manage changes in their business environment

### **D. FEES FOR SERVICES**

DCRB requires that this contract be a firm fixed price including all travel, lodging, meals and related expenses. Please describe your fees, including a breakout by hours per project task and consultant based on the methodology and work plan provide in the response. **The Consultant shall complete Attachment B and provide a firm fixed price for each item listed therein. DCRB reserves the option to award options individually or to award all items to a single firm.**

### **E. OFFEROR PROPOSALS DUE**

All proposals must be received, in triplicate, by the procurement manager or designee no later than **October 19, 2010 at 5 p.m Eastern Time**. Proposals received after this deadline will not be accepted and will be returned to the offeror unopened. The date and time will be recorded on each proposal. Proposals must be addressed and delivered to the Procurement Manager at the address listed below. Proposals must be sealed and labeled on the outside of the package to clearly indicate a response to the "Request for Proposals for Consulting Assistance in the Acquisition of a Pension Information System." Proposals submitted by facsimile will not be accepted.

Proposals become the property of DCRB upon submission and will not be returned. All cost for developing proposals is entirely the responsibility of the firm and shall not be chargeable to DCRB. DCRB accepts no responsibility for lost or late delivery of proposals.

### **F. POINT OF CONTACT**

This RFP is issued by DCRB and is subject to the Board's procurement and conflict of interest rules. Further, from the issue date of this RFP, until a successful offeror is selected and the selection is announced, there shall be no communication by potential offerors with any DCRB Board or staff members other than DCRB's Procurement Manager. Failure to comply with this provision of the procurement may result in proposal rejection and disqualification.

The Procurement Manager for all matters and questions relating to this RFP is:

Name: Mr. Donnie Bryant  
Title: Procurement Manager  
Address: District of Columbia Retirement Board  
900 7<sup>th</sup> Street NW; Suite 200  
Washington, D.C. 20001

Telephone: (202) 343-3200 FAX: (202) 566-5000  
E-Mail: [donnie.bryant@dc.gov](mailto:donnie.bryant@dc.gov)

Questions about the Request for Proposals must be submitted in writing by email to [donnie.bryant@dc.gov](mailto:donnie.bryant@dc.gov) or by fax to (202) 566-5000, Attention: Donnie Bryant, Procurement Manager.

## G. BOARD LOCK-OUT RULE

When the Board commences search procedures for the retention of an outside service provider, in order to protect the integrity of the decision making process and to avoid any and all appearances of conflict, Board members and senior staff, shall refrain from having any intentional, unauthorized contact with such service providers, other than for ordinary and necessary business purposes as a matter of public record, or unintended incidental interactions. This provision is in effect upon receipt of contract proposals until contract award or the RFP is withdrawn. The lock-out restriction is in addition to other provisions in this RFP prohibiting contact between offerors and Board members or staff.

*Offerors who initiate contact with Board Trustees or staff, other than as provided in this RFP, may be disqualified from this procurement.*

## H. EVALUATION CRITERIA

Only proposals that meet the Minimum Qualifications will be evaluated. The evaluations will take place in two phases. Phase One will involve review of written proposals. Phase Two may involve interviews with representatives of DCRB that will make the final selection. In both phases of the selection process, firms will be evaluated using the following criteria.

Criteria	Percentage
Past performance conducting similar engagements	15%
Methodology and project plan	25%
Professional staff	25%
Fee for services	20%
Technical Capability	15%

## I. DCRB SCHEDULE OF EVENTS

- 1. RFP Released: Monday, September 27, 2010*
- 2. Potential Vendor Questions and Answers Phone Conference: Tuesday, October 5, 2010*
- 3. Proposals Due: Tuesday, October 19, 2010*



## J. MISCELLANEOUS PROVISIONS

The DCRB reserves the right to cancel this RFP at any time and to reject any and all proposals submitted in response to this RFP, if the DCRB determines such action or actions to be in the best interest of DCRB.

DCRB also reserves the right to request clarification of any submission, modify or alter the Scope of Services and solicit new submissions, reject any or all submissions, and waive immaterial irregularities in any submission. **DCRB does not intend to entertain limited liability clauses of any type with the vendor selected.**

During contract formation, if DCRB or its agent is unable to agree to contract terms with the candidate receiving the highest evaluation in this RFP process, DCRB reserves the right to terminate contract negotiations with that candidate. In the event of such an impasse, DCRB may contract with the candidate receiving the next highest evaluation.

**(SAMPLE PROJECT PLAN SCHEDULE)****ATTACHMENT A**

<b>Deliverable</b>	<b>Task</b>	<b>Deliverable Due Date</b>
1. Review RFP in detail	a. Identify areas that need to be addressed.	November __, 2010
	b. Conduct a minimum of 3 meetings with project team of DCRB focusing on RFP review (onsite and telephone).	
	c. Develop a strategy to identify deficiencies of current RFP and address them.	
	d. Refine tangible deliverables/objectives of project in RFP so that the vendor question will be nominal.	
	e. Review RFP for project management requirements, testing and acceptance requirements, training requirements, hardware and software up-time requirements, technology requirements, System performance and response time requirements, batch processing window requirements, installation requirements, maintenance and warranty requirements and post-installation support requirements.	
	f. Edit RFP and create final version for public release.	
2. Develop action plan for current RFP concerns	a. Complete more detail narrative about current available data sources – both manual and electronic.	November __, 2010
	b. Define a more precise definition of split calculation in concert with DCRB subject matter experts.	
	c. Document downstream imaging/scanning mechanisms for future pension information system usage complete with mode, format, and frequency attributes.	
3. Develop strategy for DCRB procurement process	a. Identify and develop plan for stakeholder involvement in successful pension system procurement.	November __, 2010
	b. Review DCRB interfaces (data, organization, and processes) and communications for procurement of pension information system.	
4. Identify, develop and maintain a risk analysis strategy for RFP procurement and future DCRB work	a. Identify and rank internal and external risks of the pension system procurement and implementation, including probability and impact.	November __, 2010
	b. Create an amelioration plan for real threats of the pension system procurement and successful implementation.	
	c. Assist DCRB in implementing amelioration plan.	
5. RFP Evaluation Team Identification	a. Provide technical assistance and advice to the evaluation panel appointed and the chief procurement officer and identify roles/responsibilities.	November __, 2010

	b. Provide RFP, pension system project, and evaluation instructions summary to evaluation team.	
<b>Deliverable</b>	<b>Task</b>	<b>Deliverable Due Date</b>
6. Team identification and work plan	a. Assist DCRB in securing project manager (internal or external candidate) to represent DCRB for the duration of the project	November ____, 2010
	b. Identify DCRB subject matter experts, define roles, and estimate time commitments for project	
	c. Present backfill plan for DCRB staffing and cross training	
	d. Identify project sponsor and define expectations	
	e. Identify other implementation staffing holes and recommend solutions	
7. Develop strategy to correct imaging/indexing back file issues	a. Develop a plan for dealing with imaging/indexing back files	October ____, 2010
	b. Develop documentation, standard operating procedures, and check list for processes	
	c. Develop processes and controls for scanning, indexing, and data retrieval	
	d. Monitor first process implementation and recommend improvements to DCRB	
8. Assistance in addressing current on-going data cleansing	a. Develop a plan for data reclamation to be complete before the new pension information system implementation so that data will be accurate.	November ____, 2010
	b. The consultant will develop procedures and plans for scanning data at source, necessary data input, and correction of personnel data for various employee groups which includes Teachers, Fire, and Police employees.	
	c. The consultant will train and mentor internal DCRB staff on data cleansing procedures, error correction, and the necessary future data analysis to keep the data up to date and accurate.	
9. Assist in pension information system vendor selection	a. Develop Communication Plan, including what needs to be communicated, frequency, stakeholders, and responsible parties for various levels of communication.	February __ 2011 through _____
	b. Complete development of scoring methodology and evaluation approach including, defining steps in the process, define the selection criteria and weights for objective scoring, and compute overall weighted scores and bidder rankings.	

Deliverable	Task	Deliverable Due Date
9. Assist in pension information system vendor selection	c. Develop product demonstration scenarios including at least ten product demonstration scenarios to force structure on the product demonstrations that vendors will conduct. These scenarios should be representative of DCRB processing needs, and should be designed to exercise the capabilities of the software products that were proposed by vendors.	February ____, 2011 through _____
	d. Provide advice and technical assistance at a pre-proposal conference including facilitation assistance for the meeting, answering questions in advance, and follow-up on vendor questions and communications.	
	f. Provide advice and technical assistance to the procurement office upon receipt of proposals and in a review to determine responsiveness of the proposals. Identify areas of concern and questions for the evaluation panel. Assist and advise the evaluation panel selected by the chief procurement officer.	
	g. Advise and provide the evaluation panel with technical assistance. – round 1. This will include training project team on how to evaluate proposals and scoring methodology, facilitating discussion amongst team members, providing overall guidance. At the conclusion of this task, assist and advise the evaluation committee chair in the preparation of a final consensus report will be issued to the chief contracting officer.	
	h. In consultation with DCRB, the consultant will answer vendor questions so that potential vendors can propose accurately during all phases of the procurement process. At the conclusion of round one, the consultant shall assist and advise the evaluation panel on creating a competitive range. The purpose of the competitive range is to rank vendors according to their ability to meet DCRB requirements for a pension information system. Those vendors that are below the competitive range will be notified that they are no longer under consideration.	
	i. Assist DCRB in conducting reference checks on potential vendors including functionality of technology, hardware system support and maintenance, installation implementation history, response to RFP requirements, quality of training materials, number and cost of change orders, issue resolutions and warranty support, and quality of bidder staffing and suitability of the firm.	

Deliverable	Task	Deliverable Due Date
9. Assist in pension information system vendor selection	<p>j. Facilitate and coordinate with DCRB staff vendor demonstrations and site visits. The demonstration scenarios will be provided to vendors and the client evaluation team will attend each product demonstration and observe how the proposed system responds to the RFP's specific requirements. The consultant will ensure that agendas and topics of interest to the DCRB are covered, rather than what the vendors want to cover. The consultant will ensure that the solution provider has an approach / strategy in place to address each requirement of the RFP.</p>	February 2011 through _____
	<p>k. Advise and provide technical assistance to the evaluation panel. - round 2. Based on demonstrations, references, and site visits, the consultant will facilitate a discussion and advise the panel on final vendor selection. At the conclusion of this task, the consultant will advise and assist the evaluation panel chair in the preparation of a final consensus report chief contracting officer.</p>	
	<p>l. Prepare cost/benefit report for DCRB along with cost evaluation. This report will assist DCRB executive leaders and Board understanding the scope, cost, and time commitment of this project and allow for an informed oversight role.</p>	
	<p>n. The consultant will review and comment on best and final offers so that the DCRB evaluation team can make informed and accurate decisions on the final selection.</p>	
	<p>o. The consultant shall work with DCRB evaluation team to produce final evaluation narrative and justification for selection of vendor and respond to any vendor questions, inquiries, or potential appeals to the procurement process.</p>	
	<p>p. The consultant will work with DCRB in final vendor selection, contract formation, and contract signing. This includes working with potential vendor on scope, cost, and terms with the apparent winner to secure the most favorable terms and conditions possible.</p>	

Deliverable	Task	Deliverable Due Date
10. Oversight Project Management	<p>a. Assist DCRB in finalizing the implementation team including selection and training of members during all aspects of the project (development, roles/responsibilities, timeframe development, design, testing, implementation, etc.).</p>	February ___ 2011 through _____
	<p>b. Provide project leadership in conjunction with DCRB project manager. Working with the DCRB in determining scope change (both DCRB and vendor initiated) and follow established change management procedures. Perform cost / benefits analysis as necessary to assist decision-making related to proposed project scope changes. Review project management reports and metrics for accurate status and due date reporting to key participants. Review and comment on all project deliverables, documentation, etc.</p>	
	<p>c. Oversee tasks associated with requirements definition (GAP), design, development, system testing, training, and implementation activities. Ensure that the implementation vendor satisfies all items as listed in the RFP and has an approach / strategy in place to address each item as stated.</p>	
	<p>d. Participate with DCRB leadership in project planning, timeframe and budget estimation, working with stakeholders, and design/testing/implementation requirements.</p>	
	<p>e. Assuring RFP requirements are adequately addressed in the new system. Prepare requirements traceability report that will lists all DCRB RFP requirements and use it on a continuous basis to track requirements over the course of the project, confirming that no RFP requirements go overlooked. This includes the review of all appropriate products delivered in the course of the project, attendance at all appropriate meetings, discussions, training sessions, requirements definitions meetings, etc. to assure that time is well spent, that sessions are focused, that DCRB staff are comfortable and that expectations are met. The consultant shall also offer on-going documentation (review memos) as to level appropriateness, any deficiencies, etc. and provides constructive reviews and offers specific, concrete recommendations to assist in making products and processes in conformance with DCRB needs.</p>	

Deliverable	Task	Deliverable Due Date
10. Oversight Project Management	<p>f. Develop and implement an approach to identifying risks to the project's success, ranking them, developing appropriate mitigation strategies, affecting them as an integral and on-going part of the project. Ensure that contingency plans are in place where necessary and are adequate to address potential problems.</p>	February ____ 2011 through _____
	<p>g. Provide assistance in issues identification, tracking, and resolution, including ensuring that a formal control methodology is in place such that all requirements are appropriately tracked from initial gathering sessions, throughout design and development, into testing and training, and eventually into production use. The consultant should also identify issues early and create a resolution "road map" to mitigate impact on project schedule or cost and create and manage change control process by verifying the project requirements against design documents. Ensure that adequate sign-off procedures are followed throughout the system implementation life cycle.</p>	
	<p>h. Conduction of weekly project management meetings to include vendor, consultant, and DCRB project management team members to keep project on schedule. Monthly steering committee meetings with executive DCRB staff will also be required to provide updates on progress, technical issues, budgets, or other subjects that require executive decisions. Attend Board Meetings and brief the Board (if necessary).</p>	
	<p>i. Review vendor created end-user and IT documentation and operational system documentation such as system administrator operations manual, testing plans, training manuals, user manuals, application software technical procedures manual, application software end-user procedures manuals, data element dictionary, database maintenance guides, system/program maintenance documentation, software security guidelines, hardware and network requirements documentation, test and training environment implementation, and system disaster recovery procedures.</p>	
	<p>k. The consultant will conduct system testing and quality assurance before the pension information system go-live. This will include testing various predetermined scenarios and scripts, system functionality and workflows, data transmissions, delivered reports, etc.</p>	
<p>l. The consultant is expected to document all of the above in DCRB enterprise project management (EPM) system. DCRB utilizes Microsoft Project Server for this process. Detailed project plans are expected to be created in Microsoft Project 2010 and all related project documents are to be maintained on the project Website.</p>		

**PENSION INFORMATION SYSTEM REVIEW AND TECHNICAL ASSISTANCE  
PROPOSED FEE SCHEDULE**

Firms must submit fees for the “Request for Proposals for Consulting Assistance in the Acquisition of a Pension Information System” services in the format prescribed below. The proposed fees shall include all costs and expenses for providing services to the Board as described in Article III (Scope of Work) of this RFP. Please note any required services that you are unable to or unwilling to provide within your proposed bundled fee.

Firms must complete Sections A, B, and C of this fee schedule. The Board reserves the right to compensate the successful firm for services using any fee arrangement set forth below. The fee should include all travel and other out of pocket expenses. The method of payment will be determined by the Agreement, and only one payment method will be employed.

**SECTION A – BUNDLED FEES:** Firms must submit a firm fixed fee for all services as described in Section B (Scope of Work) of this RFP, to include: RFP Review and Completion; Project Team Development; and Assistance in Pension Information System Vendor Selection; Project Management Oversight for Pension Information System; Review Imaging and Indexing Process; and Create a Plan for Data Reclamation & Cleansing:

\$ \_\_\_\_\_

**SECTION B – SEMI-BUNDLED FEES:** Firms must submit a firm fixed fee for all services as described in Section B (Scope of Work) of this RFP, to include: RFP Review and Completion; Project Team Development; and Assistance in Pension Information System Vendor Selection:

\$ \_\_\_\_\_

**SECTION C – UNBUNDLED FEES:** Firms must submit a firm fixed fee for the services set forth below and as described in Section B (Scope of Work) of this RFP, to include:

Project Management Oversight for Pension Information System: \$ \_\_\_\_\_

Review Imaging and Indexing Process: \$ \_\_\_\_\_

Create a Plan for Data Reclamation & Cleansing: \$ \_\_\_\_\_

\_\_\_\_\_  
Print Firm Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Authorized Signatory Name

\_\_\_\_\_  
Authorized Signatory