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|  | **State of South Carolina**  **South Carolina Public Employee Benefit Authority**  **Request For Proposal**  **Amendment Number One (1)** | Solicitation Number:  Date Issued:  Procurement Officer:  Phone:  E-Mail Address: | PEBA0222018  5/3/2018  David H. Quiat, CPPB  803.734.0602  [dquiat@peba.sc.gov](mailto:dquiat@peba.sc.gov) |

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| DESCRIPTION: **Data Conversion & Bridging Services** |

SUBMIT OFFER BY (Opening Date/Time):   **5/22/2018 3:00 PM**

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| *The Term "Offer" Means Your "Proposal". Your offer must be submitted in a sealed package. The Solicitation Number & Opening Date should appear on the package exterior. See the clause entitled "Submitting Your Offer or Modification."* |

SUBMIT YOUR SEALED OFFER TO EITHER OF THE FOLLOWING ADDRESSES:

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| --- | --- |
| MAILING ADDRESS:  South Carolina Public Employee Benefit Authority  P.O. Box 11960  Columbia, S.C. 29211-1960  Attention: David H. Quiat | PHYSICAL ADDRESS:  South Carolina Public Employee Benefit Authority  202 Arbor Lake Drive  Columbia, S.C. 29223  Attention: David H. Quiat |

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| AWARD & AMENDMENTS | Award will be posted on **6/29/2018.**  The award, this solicitation, any amendments, and any related notices will be posted at the following web address: <https://procurement.sc.gov/vendor/contract-opps/other-solicitations/peba> |

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| You must submit a signed copy of this form with Your Offer. By submitting a proposal, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of one hundred twenty (120) calendar days after the Opening Date.    (See the clause entitled "Signing Your Offer.") | | |
| NAME OF OFFEROR      (Full legal name of business submitting the offer) | | Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror. The entity named as the offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, i.e., a separate corporation, partnership, sole proprietorship, etc. |
| AUTHORIZED SIGNATURE    (Person must be authorized to submit binding offer to contract on behalf of Offeror.) | |  |
| TITLE    (Business title of person signing above) | | STATE VENDOR NO.    (Register to obtain S.C. Vendor No. at www.procurement.sc.gov) |
| PRINTED NAME    (Printed name of person signing above) | DATE SIGNED | STATE OF INCORPORATION    (If you are a corporation, identify the state of incorporation.) |

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| OFFEROR'S TYPE OF ENTITY:   (Check one)                                                                   (See "Signing Your Offer" provision.)      \_\_\_ Sole Proprietorship                                  \_\_\_ Partnership                                  \_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_      \_\_\_ Corporate entity (not tax-exempt)          \_\_\_ Corporation (tax-exempt)            \_\_\_ Government entity (federal, state, or local) |

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**Page Two**

**(Return Page Two with Your Offer)**

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| HOME OFFICE ADDRESS (Address for offeror's home office / principal place of business) | NOTICE ADDRESS (Address to which all procurement and contract related notices should be sent.)          \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Area Code  -  Number  -  Extension                    Facsimile    \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  E-mail Address |

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| PAYMENT ADDRESS (Address to which payments will be sent.)            \_\_\_\_Payment Address same as Home Office Address  \_\_\_\_Payment Address same as Notice Address   **(check only one)** | ORDER ADDRESS (Address to which purchase orders will be sent)            \_\_\_\_Order Address same as Home Office Address  \_\_\_\_Order Address same as Notice Address   **(check only one)** |

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| ACKNOWLEDGMENT OF AMENDMENTS  Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue. (See the clause entitled "Amendments to Solicitation") | | | | | | | |
| Amendment No. | Amendment Issue Date | Amendment No. | Amendment Issue Date | Amendment No. | Amendment Issue Date | Amendment No. | Amendment Issue Date |
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| DISCOUNT FOR PROMPT PAYMENT  (See the clause entitled "Discount for Prompt Payment") | 10 Calendar Days (%) | 20 Calendar Days (%) | 30 Calendar Days (%) | \_\_\_\_\_Calendar Days (%) |

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**Amendment Number One (1)**

**Data Conversion & Bridging Services**

**Solicitation Number PEBA0222018**

**Written Responses to Questions**

Vendor #1

1. Is the State open to an “as-a-service” model?

**Response: No.**

1. Will the State permit global resources to be used in the delivery of services?

**Response: All systems and personnel supporting PEBA’s systems and data must be located within the US. The Contractor shall be prohibited from downloading data or taking data from PEBA assets.**

1. What is the PEBA anticipated on-site versus remote presence for this initiative?

**Response: PEBA believes that Contractor onsite presence is a key factor towards the successful performance of the Scope of Work detailed in Part 3 of the Request for Proposal. PEBA wishes to provide Offerors with the flexibility to propose a cost-effective, best practice approach. As such, Part 3, Scope of Work, Section 3.9 Staffing/Key Personnel and Account Management, paragraph 3.9.12 has been deleted. Offerors should indicate, in their proposal response, the percentage of time resources will be expected to be onsite at PEBA and the percentage of time key personnel is expected to be onsite versus offsite (please see 5.1.4 (p) and 5.1.6 (c)). The actual split between onsite versus offsite per Contractor resource will be determined in each individual statement of work. Please see the amendments to the Request for Proposal beginning on page 13 of this Amendment Number One (1).**

1. Is the data conversion requirements specific to a Target data model for Retirement & Insurance Apps? If so, could you share the target state data model?

**Response: The target data model will be determined once the BAS Contractor (solution) has been selected.**

1. Could you provide the details on target environment, data base, application and key technologies?

**Response: Please see the response to question 4.**

1. Is the Green Screen Apps listed on Page 21 in scope for conversion / migration?

**Response: Yes.**

1. How much History is necessary to be retained in active application for the target system & regulatory compliance?

**Response: This will be determined once the BAS Contractor (solution) has been selected. PEBA intends to leverage the Contractor’s experience and best practices to determine which data to convert.**

1. Which tools and products are currently owned by the State for data conversion / migration?

**Response: PEBA intends to leverage the Contractor’s experience and best practices and is open to the Contractor’s recommendation.**

1. What is the target state for the 65 million images on EDMS app and 15 million for EDM?

**Response: The ECM solution will be determined once the BAS Contractor has been selected.**

1. Do you have published Data Archiving Requirements? How it is being handled currently?

**Response: No, all historical data and audit trails are kept on-line.**

1. Could you provide additional details on scope for Security, Single Sign on and Security Roles?

**Response: The conversion of legacy security related data is currently not in scope of this project.**

1. What is the overlap between scope tables on page 19 and page 26? Are these two areas exclusive?

**Response: They are mutually exclusive.**

1. Section 2.3, How many resources are trained on Data Services that are already staffed at SC PEBA to run Data Conversion, Profiling services? How much time they will allocate for the new effort?

**Response: PEBA anticipates assigning 5 full time equivalent staff to support the data conversion activities. The PEBA staff members assigned to data conversion and profiling do not have any formal training on Data Services. For a description of PEBA staff skills please see the response to question 53.**

1. Will PEBA provide an IT Organization chart, the PEBA planned project delivery organization model for this RFP, and it’s planned consolidated project delivery organization model between this RFP and the BA implementation?

**Response: No. The BAS project organizational model will be finalized once the BAS Contractor has been selected.**

1. Section 2.5, Is there a requirement for a reconciliation framework and Reports as a part of Migration activity using ETL and Reporting Tool? Or will it be done at application level?

**Response: Yes. PEBA intends to leverage the Contractor’s experience and best practices and is open to the Contractor’s recommendations.**

1. Section 2.5, with regard to Data Profiling, we are assuming business rules will be applied in ETL for data quality check based on rules and Data Cleansing will be done accordingly during transformation. Will there be a separate data profiling tool required.

**Response: No requirement for a separate data profiling tool *per se*, but PEBA expects the Contractor to recommend the appropriate tools.**

1. Section 2.5, page 34, there appears to be conflicting statement: “PEBA will have primary responsibility for executing conversion activities with support from the Contractor”. However, that conflicts with the next statement that "The Contractor shall provide data profiling, cleansing and migration services in accordance with all of the requirements ".

**Response: The second sentence indicates that the Contractor must comply with all the requirements listed in Part 3, Scope of Work 3.1 through 3.10 which are a mix of primary and supporting activities.**

1. Section 3.2, page 36. This section mentions a separate data profiling activity by analyzing the source system versus the target system prior to the implementation. What is the timeline associated with this planned activity?

**Response: The timeline will be determined once the BAS Contractor has been selected.**

1. What is the “one application” referred to on page 30 with regard to screen scraping for SSN’s? It is mentioned in the Imaging/Document Management Systems second paragraph?

**Response: It is the legacy Team IA imaging application.**

1. Will the PEBA confirm that the Team IA application(s) are not intended to be replaced?

**Response: This has not been finalized.**

1. You mention that the "contractor shall be prohibited from downloading data or taking data from PEBA assets". However, we have tools, frameworks, and tools that could dramatically reduce the conversion, data quality, and cleansing effort, costs, and risks of this program. Some of these capabilities run on our “as-a-service” servers. Given the agreements that we have with the State of SC, would you be open, with the right agreement and safeguards in place, to allowing us to utilize these capabilities?

**Response: No. PEBA is not interested in an “as a service” model. PEBA, however, would entertain the use of Contractor tools in an environment established on PEBA assets.**

1. It is mentioned that PEBA plans to retire your EDM and EDMS imaging systems. Can you verify this? Have you already selected a replacement imaging system or do you want us to recommend one?

**Response: This has not been finalized. PEBA is not seeking Data Vendor recommendations concerning the future ECM system.**

1. Which workstream is the movement and cleaning of the images from EDM and EDMS to a new system part of?

**Response: Workstream 3.**

1. Can we get information on the IA Folder/IMGBITS functionality and integration in to the imaging system?

**Response: IA Folder is the viewer into Team IA images. IMGBITS is a file-based interface to Team IA images. IA Folder and IMGBITS are vendor components that enable integration with the imaging system.**

1. Is there an integration with a Lockbox or payment processing system? If so, can you elaborate?

**Response: No.**

1. We are assuming that the State of SC will be responsible for the procurement of any new servers required to support the proposed solution. Is that correct? Since the procurement, installation, and production readiness of the various environments will drive the “to be environment”.

**Response: Yes, PEBA will be responsible for the procurement of any new equipment as part of this Request for Proposal/Contract.**

1. We are assuming that data testing and functional testing of workstream 3 is in scope. Is this correct?

**Response: Yes.**

1. We believe that testing for work streams 1 and 2 should be aligned with workstream 3 and 4. Therefore, can we respond with an overall testing strategy?

**Response: Yes.**

1. For data cleaning, the effort and talent required to accomplish this is not only a function of the data quality itself, but also the tool(2) that will be used. Can we get some insight in to this?

**Response: PEBA desires to obtain the required services in the most cost-efficient manner. The preference is to allow the Contractor to utilize their standard business processes and service models in providing these services. PEBA is open to the Contractor’s recommendation. Per section 3.3, PEBA envisions the establishment of a data conversion environment to support the service required in this Request for Proposal and PEBA requires that this environment be established on PEBA assets.**

1. We have a number of tools, frameworks, and capabilities that may greatly simplify the overall data cleansing and profiling efforts. However, the RFP states that PEBA will perform this activity. Are you open to us including that work in the Contractor Workstream 3 proposal?

**Response: PEBA is seeking assistance (as defined on page 35) from the Contractor for data cleansing and profiling efforts related to the legacy ADABAS based applications. The Contractor would have primary responsibility for data cleansing and profiling efforts related to the legacy imaging/document management systems.**

1. Can you validate the role of the contractor in the following activities?

3.1.1 Identify the following types of problems with the imaging/document management systems:

· duplicates;

· missing primary-foreign key relationships;

· redundant data;

· soundex matches for the same data;

· incorrect formatting;

· incorrect data based on a numeric range;

· incorrect data based on relationship rules;

· non-unique keys;

· missing data;

· incomplete data elements based on PEBA business rules, policies, and statutes;

· referential integrity;

· orphaned records (records that should be associated to others but are not);

· childless parents (records that should have related records but do not) based on PEBA business rules, policies, and statutes;

· valid codes for specific instances (only specific codes are valid for a given situation);

· data value commonality (same code used multiple places with varying values);

· invalid date ranges (when the dates do not conform to business or logical standards);

· invalid/incomplete dates;

· invalid code values;

· code value outliers outside of expected values;

· code value anomalies based on PEBA business rules, policies, and statutes;

· amount totals vs. summarized detail;

· amount deltas based on PEBA business rules, policies, and statutes; and,

· other ad hoc or miscellaneous problems.

**Response: Please see the response to question 30.**

1. Can you validate if each of the following items around the handling of duplicate images/ metadata is for information maintained in the EDM/EDMS system, the data related to the images held in the retirement/insurance systems or both?

3.1.1 Identify the following types of problems with the imaging/document management systems:

· duplicates -

· missing primary-foreign key relationships;

· redundant data;

· soundex matches for the same data;

· incorrect formatting;

· incorrect data based on a numeric range;

· incorrect data based on relationship rules;

· non-unique keys;

· missing data;

· incomplete data elements based on PEBA business rules, policies, and statutes;

· referential integrity;

· orphaned records (records that should be associated to others but are not);

· childless parents (records that should have related records but do not) based on PEBA business rules, policies, and statutes;

· valid codes for specific instances (only specific codes are valid for a given situation);

· data value commonality (same code used multiple places with varying values);

· invalid date ranges (when the dates do not conform to business or logical standards);

· invalid/incomplete dates;

· invalid code values;

· code value outliers outside of expected values;

· code value anomalies based on PEBA business rules, policies, and statutes;

· amount totals vs. summarized detail;

· amount deltas based on PEBA business rules, policies, and statutes; and,

· other ad hoc or miscellaneous problems

**Response: The metadata and indexing/classification information is only maintained in the EDM/EDMS system.**

1. In paragraph, 3.4, the RFP mentions the need to "Agree on a glossary of terms that will be used to communicate throughout the project with the other project teams." However, in the list of activities that follows, we did not see any activities related to a data glossary or around data governance. Should we include those activities.

**Response: This statement is meant to mean that there will be agreement on common terms, not that the Contractor would have that as a deliverable.**

1. How many ADABAS Databases are there?

**Response: 2.**

1. How many ADABAS FDTs are there?

**Response: 255.**

1. How many Natural Programs are there?

**Response: The number of programs, subroutines, procedures, maps, modules, etc. is not anticipated to have any impact on the data conversion effort. Please refer to the Request for Qualifications, Part 2, Scope of Proposal, 2.1 Introduction.**

1. How many Natural Subprograms are there?

**Response: Please see the response to question 36.**

1. How many Natural Subroutines are there?

**Response: Please see the response to question 36.**

1. How many Natural Help Routines are there?

**Response: Please see the response to question 36.**

1. How many Natural Maps are there?

**Response: Please see the response to question 36.**

1. How many Report Mode Modules are there?

**Response: Please see the response to question 36.**

1. Any COBOL programs used by the applications? If so, how many?

**Response: Please see the response to question 36.**

1. Any components written in other languages? If so, how many?

**Response: Please see the response to question 36.**

1. Any JCL Streams are used by the applications? If so, how many?

**Response: Please see the response to question 36.**

1. How many ADABAS PROCs?

**Response: Please see the response to question 36.**

1. Please estimate what percentage of your Natural code executes Online vs Batch.

**Response: Please see the response to question 36.**

1. How many developers support the Natural applications?

**Response: Please see the response to question 36.**

1. How many end-users log into the online applications?

**Response: Please see the response to question 36.**

1. What is the peak number of users who are logged into your production Natural applications at the same time?

**Response: Please see the response to question 36.**

Vendor #2

1. Please provide additional information regarding the following tasks; is the goal to create a complete data dictionary for these legacy systems, or capture enough information to proceed with a data migration?
   * 1. *Assist PEBA in legacy data documentation of the Insurance & Retirement systems.*

*3.1.10  Prepare legacy data documentation of the EDMS and EDM imaging/document management systems.*

* + 1. *Assist PEBA in legacy data documentation of the Premium Billing & Insurance Accounting system.*

**Response: PEBA is currently preparing legacy system data documentation of the Insurance, Retirement and Premium Billing & Insurance Accounting systems to support this project and plans to have it ready for Contractor review upon commencement of the project. PEBA expects the Contractor to prepare data documentation of the legacy imaging systems (see 3.1.10) of sufficient detail to support the reconciliation, merging and conversion of the legacy imaging/document management systems to the new BAS.**

1. Our company has completed a post-migration data profiling and cleansing project for a pension organization with a unique member record population of 150,000 or more; we are currently performing a data migration for a pension organization with a unique member record population of 150,000 or more; and we have completed three data migrations for pension organizations that have fewer than 150,000 members. Our experience is similar regarding plans with more than 100 contributing employers.  This experience does not explicitly meet the stated requirement on page 48 of the RFP shown below. Will SC PEBA consider our response?
2. *Offeror must have a proven record of successful completion of at least two (2) data conversion services for private, state or local public benefit modernization projects performed within the past six (6) years. The size of the project must meet or exceed the following characteristics:* 
   * *The unique member record population was 150,000 or more;*
   * *The unique number of contributing employers was 100 or more; and,*
   * *3 or more separate defined benefit plans were converted within the same project.*

**Response: Yes. Please see the amendments to the Request for Proposal beginning on page 13 of this Amendment Number One (1).**

1. Given the scope of this project, as described in Section 2.3 on Page 34 (shown below), the vendor work may be sporadic throughout the life of the project.

* *Leverage PEBA staff to perform the majority of conversion and bridging, utilizing contractor experts only when required.*

How should we interpret the statement in Section 3.9.12 on page 46 (shown below) during times of high PEBA activity and low vendor activity?  Are periods of low vendor activity considered to be part of the *“duration of the portion of the Project for which they are responsible”*?

* + 1. *Key personnel shall be present at PEBA premises no less than eighty percent (80%) of the Business Days for the duration of the portion of the Project for which they are responsible.*

**Response: Please see the response to question 2.**

1. Please describe the skill mix of the 5 resources that will be dedicated to the data conversion project.

**Response: Four of the five FTEs assigned to the data team are experienced Natural developers with extensive ADABAS knowledge. The developers are familiar with the current system data and database structures. They also have extensive knowledge of current business processes and have strong business analysis skills. One of the staff members has extensive experience planning and executing data conversion and profiling activities. There is one business analyst assigned to the data team.**

1. Can the travel be a separate line item billed at cost with no markup versus including it in the hourly rates? This ensures that PEBA only pays for actual travel that is needed for the project.

**Response: Response: No. PEBA does not wish to approve actual travel expenses. PEBA, however, is open to having two hourly rates for each proposed labor classification; 1) an “onsite” fully loaded rate that includes travel and 2) a “offsite” rate that does not include any travel costs. The actual split between onsite versus offsite per Contractor resource will be determined in each individual statement of work. Please see the amendments to the Request for Proposal beginning on page 13 of this Amendment Number One (1).**

1. We understand SC PEBA’s goal of having key personnel on-site during critical activities during the project. However, we would like to propose a cost effective approach that may include peaks and valleys of resource allocation to the project that may not meet an overall 80% on-site requirement across the life of the project. Can the requirement be stated differently to allow for vendors to propose cost effective solutions that don’t explicitly meet this metric?

**Response: Please see the response to question 2.**

1. With regards to proposal submission, the vendor is required to submit both the Technical Proposal and the Business Proposal separately. Can we send one proposal package that includes separate sealed envelopes for the technical proposal and business proposal or would you prefer separate shipments of each?

**Response: Yes, Offerors may send one proposal package that includes separate sealed envelopes for the technical proposal and business proposal.**

Vendor #3

1. Do you think you can share the budget for Data Conversion and Bridging service? What dollars are appropriated for 2018 work effort? What dollars are appropriated Y-O-Y starting 2019 and ending in what year?

**Response: PEBA desires to obtain the required services in the most cost-effective manner. The preference is to allow the Offeror to utilize their standard business processes and service models in providing these services. PEBA is interested in receiving the Offeror’s staffing recommendations based upon their estimate of the work required, not based on the allocated budget. Offerors are to submit their most competitive offer.**

1. Section 3.3 - Data Conversion Infrastructure states: **“PEBA envisions the establishment of data conversion environment to support…”** 
   1. Do you think you can clarify in detail what “establishment of data conversion environments” means in general and specifically in terms of:
      1. Is PEBA asking vendors to quote **for net new software license purchase (one time perpetually)** to establish data conversion, profiling, reconciliation and cleansing to staging data for BAS?

**Response: Please see the response to iv below.**

* + 1. Is PEBA asking vendors to quote **for net new software license purchase (yearly subscription fees)** to establish data conversion, profiling, reconciliation and cleansing to staging data for BAS?

**Response: Please see the response to iv below.**

* + 1. Is PEBA asking vendors to use existing already licensed software by PEBA if so please specify the company name, software name and details including version number) to establish data conversion, profiling, reconciliation and cleansing to staging data for BAS?

**Response: Please see the response to iv below.**

* + 1. Is PEBA asking vendors/contractors to **bring their own licenses establish** data conversion, profiling, reconciliation and cleansing to staging data for BAS. **Once completed tear down the environments.**

**Response: PEBA intends to leverage the Contractor’s experience, tools, methodology and best practices. The intent is for the Offeror to propose the data conversion/staging environment, that in their estimation, would be most advantageous to PEBA and to supply a detailed “bill of goods” for PEBA to better understand what the proposed environment entails. PEBA is not seeking at this time for the Offeror to procure any hardware and software. Please refer to Part 5, Information For Offerors To Submit, 5.2 Business Proposal, (b).**

1. Do you think you can provide more details regarding the current status (start dates where applicable including the vendors award) for work streams 0,1, 2, 4, and 5 in general and more specifically related to interdependence on work streams 03. For example high level milestones and dependencies etc.

**Response: Workstream 0 – Requirements Definition & Vendor Procurement is currently in progress and will wrap-up upon the selection of the Data Conversion Contractor and the BAS Contractor. PEBA has contracted with Linea Solutions to assist with both procurements. Workstreams 1 & 2 represent the anticipated two phases of the implementation of the new BAS. These two workstreams have not yet started and their duration has not yet been finalized. It is PEBA’s expectation that the Data Conversion Contractor will coordinate deliverables & milestones with the to be determined BAS Contrcator. Workstream 4 – Organizational Change Management is currently in progress and it is anticipated to run concurrently with the other workstreams. PEBA is staffing Workstream 4 solely with PEBA resources. Workstream 5 – Program Management is currently in progress and it is anticipated to run concurrently with the other workstreams. PEBA has contracted with Linea Solutions to assist with program management.**

1. Has PEBA completed the selection and procurement of new BAS system, If YES, please share the name of the vendor/system selected

**Response: No, PEBA is currently working on a separate BAS system procurement.**

**Amendment Number One (1)**

**Amendments to the Request for Proposal**

**Data Conversion & Bridging Services**

**PEBA0222018**

**Amend Part 3, Scope of Work, Section 3.9 Staffing/Key Personnel and Account Management, paragraph 3.9.12, by deleting it in its entirety.**

**Amend Part 4, Mandatory Minimum Qualifications, (c), by deleting it in its entirety and replacing it with the following:**

1. Offeror must have a proven record of at least two (2) data conversion services for private, state or local public benefit modernization projects performed within the past six (6) years, one of which must be completed. The size of the project must meet or exceed the following characteristics:
   * The unique member record population was 150,000 or more;
   * The unique number of contributing employers was 100 or more; and,
   * 3 or more separate defined benefit plans were converted within the same project.

**Amend Part 5, Information for Offerors to Submit, 5.2 Business Proposal, (a), by deleting it in its entirety and replacing it with the following:**

1. Offerors should provide their not-to-exceed hourly rates to be charged for all personnel positions specifically identified in section 5.1.5 (a) who will be billed to PEBA during the term of this contract. The proposed onsite hourly rates shall be inclusive of all costs (travel, meals, lodging, equipment, and any other related expenses) to provide client services as outlined in the scope of work. The proposed offsite hourly rates shall be exclusive of any travel related costs. Hourly rates will be fixed for the duration of the contract period. Offeror’s proposed hourly rates will not be an evaluation factor but may be utilized during the negotiation process.

Offerors should list the individuals (employee name/title) under the appropriate labor classification in the table below.

|  |  |  |
| --- | --- | --- |
| ***Labor Classification*** | ***OnSite***  ***Hourly Rate*** | ***OffSite***  ***Hourly Rate*** |
| *Principal Consultant (Executive, Director, or Principal Consultant)* | $ | $ |
|  |  |  |
| *Senior Consultant (Senior Business Analyst, Senior Project Manager, Senior Technical Architect)* | $ | $ |
|  |  |  |
| *Consultant (Business Analyst, Project Manager, Technical Architect)* | $ | $ |
|  |  |  |
| *Associate Consultant (Technical Writer, Training and Documentation Support)* | $ | $ |
|  |  |  |
| *Secretarial / Clerical* | $ | $ |
|  |  |  |
| *Administrative Support* | $ | $ |

In order to ensure effective direction of the requirements outlined in 3.1 through 3.8 above, a statement of work, unique to each three (3) month period of work, shall be established by PEBA and the Contractor prior to the performance of each period of work. The statement of work shall include, at a minimum, detailed descriptions of all of the tasks to be performed to fully complete the requirements, which personnel from the Contractor’s proposed personnel will be assigned to the requirements and their corresponding onsite and/or offsite hourly rates (as applicable), the total number of onsite hours to fully complete the requirements, the total number of offsite hours to fully complete the requirements and a clear definition of all deliverables.