



Chicago Teachers' Pension Fund

Questions and Answers #1 Related to the RFP for OCM

- 1. Given the hectic holiday schedule, would CTPF be willing to grant a two-week extension for proposal submissions?**

Answer: No. The current schedule will be retained.

- 2. For all forms that require signatures, are wet signatures required, or will electronic signatures suffice?**

Answer: Wet signatures are not currently required by CTPF, unless specifically required by statutory regulations.

- 3. Would CTPF provide a detailed copy of the implementation plan? Additionally, will CTFP confirm that Pilot 1, Pilot 2, and Pilot 3 are concurrent (or consecutively)?**

Answer: CTPF will share a final implementation plan with the bidder receiving the final RFP award. CTPF presumes that each pilot will contain unique functionality, and may run concurrently throughout the implementation.

- 4. Since CTPF is still working remotely, please confirm CTPF on-site expectations. It is assumed that this project will start remotely, and transition to a mix of onsite and remote support.**

Answer: CTPF is working remotely, and therefore, this project will commence remotely. Currently, CTPF is unable to confirm whether a transition to on-site and remote support will take place. CTPF will communicate this information in a timely manner.

- 5. Given Illinois Freedom of information Act provides multiple exemptions for disclosure, including Trade Secrets and Personal Information, may Bidders submit a redacted proposal for CTPF use with supporting justification for redactions?**

Answer: Yes. Two versions of the written submission may be submitted, one identified as "CONFIDENTIAL" and the second as "PUBLIC". The confidential version will be shared exclusively with the members of the evaluation committee. The Public version will be available for public inspection should a Freedom of Information Act (FOIA) request be submitted and meet the FOIA requirements. This information will be disclosed

in accordance with CTPF's Contract Administration and Procurement Policy and FOIA. These policies may be found at www.ctpf.org/post/procurement-policies-procedures. Additionally, CTPF is willing to engage in good faith discussions with a bidder expressing concerns regarding the submission of confidential information.

- 6. Please confirm who will be responsible for overall training strategy. Typically, the overall training strategy is an OCM responsibility along with OCM training. The solution/system for pension administration training, development, & delivery is assumed to be the PAS Vendor's responsibility.**

Answer: CTPF expects that the selected OCM vendor will coordinate its services with PAS vendor.

- 7. Does CTPF have a learning management system available for disseminating, tracking and storing training?**

Answer: No.

- 8. The RFP indicates the bidder will have access to the As-Is and To-Be processes agreed to by CTPF and PAS Vendor. Please confirm. Additionally, can CTPF confirm if the PAS Vendor is also eliciting operational process changes or is their scope limited to process changes directly resulting from the system?**

Answer: CTPF deems its documentation regarding current processes to be adequate; however, it acknowledges that some additional mapping may be required. CTPF believes that the scope of this effort is limited to process changes directly resulting from the new system.

- 9. Can CTPF confirm if there is an anticipated workforce impact that may result in collaboration with labor unions or stakeholder groups not identified in the solicitation?**

Answer: No collaboration is expected.

- 10. For submitting the proposal, is there an individual size limit for each file or an aggregate limit for email attachments to CTPF? Also, is it permissible to submit the proposal in consecutive emails to avoid potential rejection or quarantine due to size? Will CTPF also provide an acknowledgement/receipt of the submission?**

Answer: (a) CTPF does have size restrictions on email attachments and suggests that all written submissions, where size is a concern, be delivered via Zip Files. Should a concern arise regarding the size of the file to be delivered, please contact Lupe Garcia, garciam@ctpf.org prior to submitting the proposal for appropriate assistance.

(b) Yes. It is permissible to submit the proposal in consecutive emails. Please indicate that the submission will be delivered in multiple emails and identify each component of the multiple submissions.

(c) Yes. CTPF will provide acknowledgement/receipt of the submission.

11. Is there a template or format CTPF would prefer for the costs by different categories and line items? Also, is there a template or format for payment schedule?

Answer: No.

12. Will CTPF consider redacting the first name and last name from the questions submitted when publishing the answers/responses?

Answer: Questions will be posted without any identifying information for the bidder or the specific bidder point of contact who submitted the question(s).

13. How many internal units/departments/divisions will be utilizing the new pension administration system or receiving information from the new pension administration system?

Answer: Refer to **Section 6.1** of the RFP. All business units with the exception of Investments will be using the new PAS.

14. How many external partners does CTPF use to process such things as retiree payroll?

Answer: None. CTPF's primary focus in soliciting the requested services is for the management of its internal workforce. "External partners" are deemed entities operating outside of the CTPF workforce and are excluded from the current competitive solicitation.

15. How many employers does CTPF have, and how many of these employers submit distinct employer contribution reports to CTPF?

Answer: Please refer to the Answer above, #14; notwithstanding, there are 133 entities that submit unique employer contribution reports.

16. Are consulting firms who are currently contracted with CTPF eligible to respond to this RFP?

Answer: Yes