Questions and Answers Related to the RFP

Public Version

Evaluation Consulting Services for the Acquisition of New Information Technology

Note: This is the public version of this Q&A document. It contains answers to all questions except number 28, which shall require that you submit an NDA. Click here for the NDA

1. Section VII.G.e mentions about SOC reports. We are currently undergoing our first SOC Type 2 Audit. It is currently in WIP state. Will this be considered?

Answer: Yes

2. Whether necessary IT infrastructure (software, hardware, virtual machine, license, connectivity) would be provided by CTPF for execution of POC for evaluating new technologies.

Answer: Yes

3. If a new SAAS/PAAS/IAAS based cloud technology would be required to evaluate before selecting the same for adoption by CTPF, will CTPF provide necessary subscription required for conducting functionality and/or load testing?

Answer: Yes

4. Consultants engaged in this would work remotely or on-site? Is there a mandate on this?

Answer: The location of the work performance will be coordinated in collaboration with the respective CTPF personnel and consultant awarded the bid taking into account variant factors and the project.

5. What are the key drivers for the project - what are the key business objectives?

Answer: Key drivers include risk mitigation, and assurance of selected solution suitability, effectiveness, and value.

6. What is the existing technology landscape – ERP/CRM/IT-OT platforms/Service enablers/distributor portals, etc.
Answer: Existing technology landscape includes ERP and PAS (Pension Administration System) platforms, hosted and SaaS applications.

7. How the IT projects will be governed – which team will lead IT or Business?

Answer: Governance is by the CTO under the auspices of the Board of Trustees and reviewed by the Director of Internal Audit.

8. The Consulting service may be based on a period of engagement or number of IT products to be implemented – what will it be in this case?

Answer: The term of the awarded services will be for the length of the awarded published contract and extensions.

9. Will any business interaction or requirements gathering be covered within the scope?

Answer: Interaction with CTPF’s business department directors and managers. Additionally, requirements gathering are expected.

10. Has there been any visioning document for this project – what the business wants/ or Gap analysis?

Answer: No

11. Some software products may require external implementation partners or SI’s. Will the consultant be involved in selecting such partners as well?

Answer: Yes

12. Will the consultant have to be engaged for assessment of data maturity for the respective projects/ implementations?

Answer: Yes

13. Will the consultant be able to participate in implementation of the software?

Answer: Implementation of the software may be approved by the CTO.

14. What will be the role of the consultant(s) after selecting the IT software and Implementation partner? Will it be involved in overseeing the implementation as a PMO, or will the consulting engagement be concluded at that point?

Answer: Implementation oversight may be approved by the CTO.

15. Will there be any business case evaluation involved during the stage of the project?
16. Will the Consultant(s) be involved for any change management or training?

   **Answer:** Involvement in change management or training shall be discretionary with the CTO.

17. We noticed that the IT Staff is not included in the RFP Contact list. Is that intentional or will they be involved in this process? Should we keep this confidential?

   **Answer:** Involvement by IT staff will be discretionary with the Chief Technology Officer. Publication of the RFP is not confidential.

18. We typically approach these type of engagements in one of two ways. The first is as a one-time “Project” to analyze the infrastructure, applications, security, processes, structure, etc. and out of that project comes a list of deliverables such as: a gap analysis, recommendations, initiatives list, IT budget, timelines/roadmaps, etc. The second way we handle this is through the way of a “Virtual-CIO” to be assigned to work on those same things but at a slower pace and over an extended period of time. The virtual CIO route all lends itself to companies looking for longer term involvement and oversight and guidance of ongoing technology initiatives. Is CTPF looking for a one-time project, a Virtual CIO, or a combination of both approaches for this engagement?

   **Answer:** Not a virtual CIO or a one-time project, but rather performing technology assessment and product evaluation as needed and directed by the CTO.

19. After submittal of the RFP response, what is the anticipated “Quiet Time Period” / evaluation timeframe and notification of vendor selection?

   **Answer:** The Quiet Period will be effect from the publication of the RFP on February 7, 2020, and continue until contract negotiations are finalized with the final winning bidder.

20. Is the selected vendor able to bid on the technologies that are recommended to the Fund OR is the vendor that is selected ONLY recommending solutions and NOT participating in any solution delivery?

   **Answer:** The selected vendor is not prohibited from bidding on any solution delivery, but participation is subject to award.

21. Can CTPF share a list of IT-related projects that are planned over the course of this award’s five-year term (that will involve the selected vendor)? We assume that additional projects may be added throughout the term, but we are looking for a gauge on the proper time and resources that will be needed to fulfill and exceed the requested service expectations.
Answer: ERP replacement, PAS (Pension Administration System) replacement.

22. To what degree will the chosen vendor partner be given access to the fund’s current IT infrastructure in order to provide the assessment as described in section 1 under the Scope? Assuming that all security and compliance protocols are satisfied, can software agents be deployed to all nodes for data collection?

Answer: The chosen vendor partner will be given reasonable and necessary access to the Fund’s current IT infrastructure. Software agents and equipment may be deployed under the expressed approval of the CTO.

23. Does the fund currently utilize any project management software platforms? Which one(s)?

Answer: Jira.

24. Can the fund provide some examples of completed projects that would be representative of the projects that will be in the scope of this service engagement? If details of these projects cannot be provided due to confidentiality and compliance reasons, then high-level descriptions would still be helpful.

Answer: Examples include hyper-converged infrastructure, disaster recovery, software licensing agreements, and managed detection and response projects.

25. Can you broadly describe the existing technology products, equipment, and infrastructure? Is there any technical document with respect to this that CTPF can share?

Answer: Most critical vendors for existing IT infrastructure include Cisco, Microsoft, and AWS. No technical documents will be shared during the RFP selection process.

26. Can CTPF provide target dates for the start of 1) Assessment phase of Evaluation Consulting Services (ECS) project, 2) Review and Prepare Documentation phase, and 3) Evaluate Proposal phase? This information will help us establish the dedicated resources we need to meet your goals, timelines, and other requirements to ensure achievement of your strategic goals.

Answer: There are currently no assigned target dates.

27. Would the assessment of current IT products include cybersecurity, vulnerability and effectiveness.

Answer: Yes.

28. Is CTPF able to indicate the number and types of storage arrays?

Answer: An NDA (Non-Disclosure Agreement) must be signed first to release such information. Click here for the NDA
29. Are there any incumbent contractors supporting this work?

   Answer: No

30. Is there a page limit on proposal submissions?

   Answer: No.

31. Is this a time & materials contract? Is CTPF able to estimate the total number of hours to be required?

   Answer: This is a time and materials contract, consequently there is no estimate of the total number of required hours.

32. Should submitters include an hourly labor rate for each of the proposed labor categories proposed as part of the engagement?

   Answer: CTPF prefers the submission of both blended and single billing rates, and will evaluate each according to the best responsive and responsible bid proposal.

33. Should submitters indicate the labor category that is being proposed as the primary “information technology consultant”?

   Answer: Yes.

34. Are you providing a template for the pricing proposal? If not, should we also include the estimated travel and ODC’s in addition to the hourly rate build up?

   Answer: CTPF will not provide a template for the pricing proposal; however, bidders are invited to include estimated travel and ODC’s in addition to the hourly rate build-up.

35. Does CTPF have mandatory Terms and Conditions required in the MPSA?

   Answer: The bidders are asked to provide a sample MPSA to serve as the framework for negotiations. Aside from statutory provisions, the terms are negotiable once an award has been made.

36. Do references have to be current clients or can they be clients for whom the contractor no longer serves?

   Answer: References may include current and former clients.

37. Can CTPF please provide the attachment or link to the referenced EEOC chart?

   Answer: [https://www.ctpf.org/post/non-investment-procurements](https://www.ctpf.org/post/non-investment-procurements)
38. Is there a requirement for a certain number of key personnel?

   **Answer:** No.

39. Does assessment of information technology, products and services include an assessment of existing hardware, software and peripheral equipment?

   **Answer:** Yes.

40. Can CTPF indicate the approximate size of the IT network, including the number of devices, and end users?

   **Answer:** The Fund’s IT network fits into the category of a SMB network.

41. Is CTPF able to approximate the annual IT budget, detailed by category (i.e., hardware, software, personnel, outsourcing, etc.)?

   **Answer:** This CTPF budgetary information may not be disclosed and will remain confidential. Further, the budgetary information is not relevant to the services requested in the subject RFP.

42. Is CTPF able to indicate the most critical vendors (i.e., Microsoft, Cisco, Oracle) that make up the existing IT portfolio, to be included as part of the Assessment deliverable?

   **Answer:** Current critical IT vendors include Cisco, Microsoft, and AWS.

43. Is CTPF able to indicate the numbers, locations, and types of data centers to be included in the scope of work?

   **Answer:** A primary data center and a remote warm data center.

44. Is CTPF able to indicate an approximate number of IT staff supporting their technology services?

   **Answer:** Twenty (20) personnel in the IT Dept. with various assigned project, operations, and development support roles.

45. Is CTPF able to distinguish the approximate percentage distribution of their assets (i.e., on premise, in cloud, hybrid)? Is CTPF comfortable with this distribution or is it looking to increase use of cloud and hybrid technology?

   **Answer:** 80/20 on-prem. to cloud ratio, with more cloud migration and adoption expected.