



**Burlington Employees Retirement System  
(BERS)  
Request for Proposal  
Benefits Administration System  
(BAS)  
Oversight Project Management**



**LRWL Inc.  
Suite 400  
1800 Alexander Bell Drive  
Reston, VA 20191**

**Offices in Sarasota, FL, Cincinnati, OH, and San Jose, CA**

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**November 11, 2016**

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- Attachment 2 - LRWL Detailed Staff Resumes
- Attachment 3 – OPM<sup>ANAGEMENT</sup> Tools<sup>TM</sup>
- Attachment 4 - Client Letters of Reference



## COVER LETTER



1800 Alexander Bell Drive  
Suite 200  
Reston, VA 20191  
703-385-3440

November 11, 2016

Mr. Rich Goodwin and Ms. Stephanie Hanker  
Director Financial Operations, Retirement/Insurance Administrator  
Burlington Employees Retirement System  
149 Church Street, 2<sup>nd</sup> Floor  
Burlington, VT 05401

Dear Mr. Goodwin and Ms. Hanker:

**LRWL Inc. (LRWL)** appreciates the opportunity to submit this proposal to provide **Benefits Administration System (BAS) Oversight Project Management Services** to the **Burlington Employees Retirement System (BERS)** in response to your Request for Proposal (RFP) dated October 28, 2016.

LRWL provides the following confirmations and certifications:

- Our proposal and all price information are valid for 90 days.
- Our corporate name and contact information:
  - ✓ LRWL Inc.
  - ✓ 1800 Alexander Bell Dr. Suite 400
  - ✓ Reston, VA 20191
  - ✓ (703) 385-3440
  - ✓ Fax (703) 385-4491
  - ✓ Cell (703) 200-6021
  - ✓ E-mail: [info@lrwl.com](mailto:info@lrwl.com)
  - ✓ URL – [www.lrwl.com](http://www.lrwl.com).

LRWL's Federal Employer Identification Number (FEIN): 45-3941738

- This letter is signed by Leon Wechsler, LRWL President (phone: 703-385-3440), who is authorized to bind LRWL Inc. and is the primary contact with regard to our proposal to BERS.

LRWL is the **only nationwide** consulting firm whose operations specifically focus on supporting consulting to public retirement systems in their administrative solution, technology acquisition, subsequent implementation efforts and other technology and business process improvement activities. Our stated corporate mission is, ***"To assist public retirement systems in meeting the expectations of their customers."***



In our response to the RFP, we detail how LRWL will use our experienced resources and industry leading processes to provide BERS with services that will meet and in many cases, exceed the requirements and objectives of this important project.

LRWL brings a working partnership approach, proprietary methods, skilled consultants, and technical knowledge that will enable your team to reach the goals more quickly, but also with a high degree of quality and less risk. Our innovative – yet pragmatic – approach leads to better business results for our clients, and they consistently give us high marks in this regard. We are looking long term for BERS' success. We offer:

- The right team - experienced resources that can support BERS' needs immediately upon contract approval.
- A time-tested approach; our proprietary approach has continued to evolve based on experience with more client success stories than any other firm in this industry – over 50 similar to BERS'.

And, we will leverage best practices from years of experience with organizations very similar to BERS, as well as our specialized expertise in public pension systems. This will lead to better outcomes for BERS than less experienced firms can offer.

Based on these qualifications and our confidence in this project's success, LRWL affirms our willingness to perform the services as described in this RFP.

LRWL has the availability of staff and other required resources necessary for performing all services and providing all deliverables within the time frames specified. The entire LRWL project team looks forward to working with BERS.

If you have any questions about our firm, our staff, our experience and qualifications, or our public retirement system client projects, please call me at (703) 385-3440.

All the best, and we look forward to working with you!

Very truly yours,

A handwritten signature in blue ink that reads "Leon R. Wechsler".

Leon R. Wechsler  
President

Enclosures

Cc: Jack Calcagno  
Ben Lott  
Ed Meyers



## REPRESENTATIONS AND WARRANTIES

All firms are required to submit this executed copy as an attachment to the cover letter of the RFP.

- A. The firm warrants that it maintains an errors and omissions insurance policy providing not less than \$2 million of coverage for negligent acts or omissions, a copy of which will be submitted to the Mayor and City Council of Burlington (City) upon selection, and that such coverage will be applicable to the firm's actions, responsibilities and obligations under a Consulting Agreement.
- B. The firm warrants that it will accept \$90,000 as full compensation for the services more fully described in its response to the RFP and provided to the Mayor and City Council of Burlington under a Consulting Agreement. Except as to certain expenses provided enumerated in the Consulting Agreement, the firm shall not be entitled to the payments of any additional monies for reimbursement of expenses or for provision of any services (including attendance at meetings and hearings).
- C. The firm warrants that it has completed, obtained, and performed all registrations, filings, approvals, authorizations, consents or examinations require by any government, governmental authority, or other regulatory authority with respect to all services, actions, responsibilities, and obligations contemplated to be rendered by the firm under an Investment Advisory Agreement.
- D. The firm warrants that it meets all the minimum criteria applicable to the firm under this RFP.
- E. The firm warrants that the person submitting this Proposal and executing these Representations and Warranties is duly authorized by the firm to submit this Proposal and execute these Representations and Warranties.

Acknowledged and Accepted:

A handwritten signature in blue ink that reads "Leon R. Wechsler".

\_\_\_\_\_  
Leon R. Wechsler  
LRWL Inc. President



## MINIMUM QUALIFICATIONS, DELIVERABLES, AND STAFFING

**In order to be considered, a vendor must meet, at a minimum, the following qualification requirements, provide the identified deliverables, and include the following staffing.**

**Experience — Vendor must have a minimum of 3 years of experience overseeing the installation and implementation of BAS systems.**

LRWL meets and exceeds this qualification. We have provided the required consulting services to public sector clients, specifically and exclusively to public retirement systems, for more than 23 years. We have worked for 50 clients in a capacity similar to BERS' requirements.

**At least one of the projects must have involved PTG. Previous experience with public retirement systems in Vermont is also desirable.**

LRWL fully meets this qualification. We have worked with PTG successfully on the Baltimore Employee Retirement System implementation and welcome the opportunity to do so with BERS. We have done similar work for the Vermont Retirement Systems. And we have supported pension and benefit systems in all New England states.

**The firm must have experience in supporting a minimum of 10 such BAS implementations.**

LRWL meets and exceeds this qualification. We have consulted to over 75 public employee retirement agencies in over 30 states. Our client list is included in Table 1 below; clients with similar scope as BERS are in **bold**. Attachment 1 includes one page descriptions of the projects we are using as references.



**Table 1 - LRWL Client List**

<i>New Jersey</i> DPB	<i>Texas</i> MRF	<i>North Dakota</i> PERS
<i>New York</i> SLRS	<i>Georgia</i> ERS	<i>San Bernardino County</i> ERA
<i>Ohio</i> PERS	<i>Indiana</i> TRF (School)	<i>Los Angeles Fire &amp; Police</i> PS
<i>California</i> STRS	<i>Massachusetts</i> TRS	<i>District of Columbia</i> RB
<i>North Carolina</i> DST RSD	<i>Nevada</i> PERS	<i>Colorado</i> FPPA
<i>Wisconsin</i> ETF	<i>Louisiana</i> SERS	<i>Fairfax County</i> ERS
<i>Pennsylvania</i> PSERS (School)	<i>West Virginia</i> CPRB	<i>San Diego City</i> ERS
<i>Virginia</i> Retirement System	<i>Illinois</i> SERS	<i>Alameda County</i> ERA
<i>Georgia</i> TRS	<i>Idaho</i> PERS	<i>Denver</i> ERP
<i>Illinois</i> MRF	<i>Kentucky</i> TRS	<i>Virgin Islands</i> GERS
<i>Mississippi</i> PERS #1	<i>Hawaii</i> ERS	<i>Kern County</i> ERA
<i>Mississippi</i> PERS #2	<i>Connecticut</i> OSC	<i>Austin</i> ERS
<i>Bahamas</i> NIB	<i>Maine</i> PERS	<i>City of San Jose</i> DRS
<i>Maryland</i> SRA	<i>New Mexico</i> PERA	<i>San Mateo County</i> ERA
<i>Tennessee</i> CRS	<i>New Hampshire</i> RS	<i>Fort Worth</i> ERF
<i>Puerto Rico</i> RS	<i>New York City</i> PPF	<i>Tulare County</i> ERA
<i>Iowa</i> PERS	<i>Oklahoma</i> PERS	<i>City of Fresno</i> RS
<i>Kentucky</i> RS	<i>Rhode Island</i> ERS (#1)	<i>Tacoma</i> CERS
<i>Missouri</i> PSRS / PEERS	<i>Rhode Island</i> ERS (#2)	<i>San Luis Obispo Co</i> PT
<i>Indiana</i> PERF (State)	<i>Vermont</i> OST/RD	<i>El Paso Fire &amp; Police</i> PF
<i>Ohio School</i> ERS	<i>State-Boston</i> RB	<i>Charlotte Firefighters'</i> RS



## 1. BACKGROUND

Please provide your firm's full name and address of the main office as well as the name, address, and phone number of the professional within the office that will be assigned specific responsibility for consulting services with BERS.

- LRWL Inc.
- 1800 Alexander Bell Dr. Suite 400
- Reston, VA 20191
- Voice (703) 385-3440
- Fax (703) 385-4491
- Cell (703) 200-6021
- E-mail: [info@lrwl.com](mailto:info@lrwl.com)
- URL – [www.lrwl.com](http://www.lrwl.com).

Below we identify staff to work on the BERS project:

- **Leon Wechsler** – Program Director and Project Advisor – overall project direction and point of contact
- **Edward P. Meyers** – Principal Consultant and Oversight Project Manager – on-site, day to day support to the project – assigned half time
- **John Van Dunk** – Project Specialist – experienced in working with PTG on our recently completed Baltimore project; available to provide PTG-focused experience
- **William R. Morrow** – Project Specialist – Technology – available to address specific technical issues
- **Peter Cole** – Project Specialist – Imaging – available to support specific imaging related issues.

Please provide a valid Federal Tax Identification Number with the proposal.

45-3941738

Please provide a brief history of your firm including the length of time your firm has been in business, the period of time your firm has provided services similar to those to be provided to BERS.

LRWL was founded in 1981. For nearly 23 years, beginning in 1993, LRWL has been providing consulting services exclusively to public funds of the specific nature now requested by BERS. As such, our stated corporate mission is, “... to assist public retirement systems in meeting the expectations of their customers.” As a result of its decision to concentrate on the public pension system arena, LRWL is now the preeminent provider of such consulting support to public employee system clients, such as BERS.

LRWL is the only consulting firm whose operations are specifically focused on supporting public retirement systems, nationwide.

Our headquarters office is located in Reston, VA. Our consultants are based throughout the U.S. To support our clients across the country, we have a number of regional offices; today they include: Sarasota, Cincinnati, and San Jose.





**Describe mergers, acquisitions, name changes, or any material developments in the ownership structure of your organization over the past three years. Please provide financial statements and/or discussion of all sources of firm revenues including any revenues generated from affiliates.**

LRWL was founded in 1981 as a Virginia corporation under the name L. R. Wechsler, Ltd. Recently, the firm entered into a tax free transaction within the IRS Code, to become a Florida corporation under the name LRWL Inc. The ownership and management have remained the same. There have been no acquisitions or mergers – all growth has been organic. The sources of firm revenue consist solely on those fees generated by our primary business focus, which are our technology, operations, and management consulting business to public pension and benefits clients.

As 100% of our revenue is derived from the public pension industry, we would allocate the revenue as follows:

- Oversight Project Management/Quality Assurance - 45%
- Project Management - 20%
- Procurement Assistance - 25%
- General/Miscellaneous Consulting - 10%.

**Please identify any lawsuits that your firm is a party to or has been a party to in the past five (5) years, even if such suits were settled out of court or by arbitration.**

LRWL has no pending lawsuits or past litigation. There are no pending, threatened, or past bankruptcy proceedings.

**Identify any contract terminations and the reasons for such terminations in the past five (5) years.**

LRWL has never had a contract terminated for default or any other reason.

**Explain in detail, any possible conflict of interest or perceived conflict that might be created if your firm is chosen for this engagement.**

LRWL maintains complete independence and objectivity with respect to all hardware, software, and consulting firms. LRWL has no conflict of interest.

**Please list the owners of the firm (from largest to smallest with respect to ownership) and their ownership percentages over the past three years. Please include individuals and all other entities. Describe any planned material changes in your organization in detail.**

Leon and Marysue Wechsler are owners of LRWL Inc. Leon owns approximately 67% of the stock; Marysue owns approximately 33% of the stock.

There are no planned changes in the organization.



**Please provide names of at least two (2) clients lost over the past five (5) years.**

**Please provide contact name, address phone number, and reason for their loss.**

LRWL has never lost a client other than those whose engagements have been completed. We would be happy to include contact information for those engagements that have been completed if BERS desires. We have provided additional references in Organization of Proposal Detail Question 4 - References



## 2. PROPOSED STAFF

Please provide a resume of each key proposed person to be assigned to the BERS project, including the following information:

Name:  
Title:  
Role:  
Total years of technical experience:  
Total years with the firm:  
Technical qualifications related to this work:  
Educational qualifications:  
Total current number of assigned clients Lead.

Table 2 - LRWL Proposal Staff

Name	Role	Technical Expertise (Years)	Years Pension Experience/# Pension Projects	Time Employed at LRWL (Years)	Degree	Current Assigned Clients	Role Details
Leon Wechsler	Program Director	40+	23/50+	35	<ul style="list-style-type: none"> <li>BS Mechanical Engineering</li> <li>MS Computer Science</li> </ul>	<ul style="list-style-type: none"> <li>NYC PPF</li> <li>WI ETF</li> <li>Austin</li> <li>SamCERA</li> </ul>	<ul style="list-style-type: none"> <li>Program Director</li> <li>Remove project impediments</li> <li>Provide strategic direction and best practices</li> </ul>
Eddie Meyers	Oversight Project Manager	25	25/7	4	<ul style="list-style-type: none"> <li>BS Accounting</li> </ul>	<ul style="list-style-type: none"> <li>San Luis Obispo Pension Trust Fund</li> </ul>	<ul style="list-style-type: none"> <li>Planning</li> <li>On-site</li> <li>Reviewing deliverables and processes</li> <li>QA and test guidance</li> </ul>
John Van Dunk	PTG Specialist	18	34/16	8	<ul style="list-style-type: none"> <li>BA Social Sciences</li> </ul>	<ul style="list-style-type: none"> <li>SJ ORS</li> </ul>	<ul style="list-style-type: none"> <li>Available to support PTG-related issue</li> </ul>
Will Morrow	Technical Resource	32	13/11	11	<ul style="list-style-type: none"> <li>BS Business Admin</li> <li>BA Economics</li> <li>MS Public Policy</li> </ul>	<ul style="list-style-type: none"> <li>San Mateo CERA</li> </ul>	<ul style="list-style-type: none"> <li>Available to support technical issues</li> </ul>
Peter Cole	Imaging Resource	40+	19/39	14	<ul style="list-style-type: none"> <li>BS Civil Engineering</li> <li>MS Civil Engineering</li> </ul>	<ul style="list-style-type: none"> <li>Illinois TRS</li> </ul>	<ul style="list-style-type: none"> <li>Available to support imaging issues</li> </ul>



Below are summary resumes of the professionals assigned to the BERS account and their respective areas of responsibility. Their detailed resumes can be found in Attachment 2.

- Leon Wechsler – Program Director and Project Advisor
- Edward P. Meyers – Principal Consultant and Oversight Project Manager
- John Van Dunk – Project Specialist – Senior Consultant – PTG focused – if needed
- William R. Morrow – Project Specialist – Technology – if needed
- Peter Cole – Project Specialist – Imaging – if needed

**Mr. Leon Wechsler, PE**, President of LRWL, has been actively involved in more than 55 projects in the public employee retirement arena – all of them including pension technology and business process reviews aimed at identifying needs, completing feasibility assessments and plans, evaluating system requirements, and defining technology / organizational / processing changes to improve the delivery of customer services. Many of these projects also included the development of comprehensive RFPs and subsequent oversight project management and quality assurance (OPM/QA) services in support of the implementation of the improvement initiatives. He has close to 25 years of retirement and insurance experience. *He will provide overall project direction.*

**Mr. Ed Meyers**, Project Manager / Senior Consultant, and business executive with over 25 years of expertise in the management and financial aspects of technology enablers. Prior to joining LRWL, he was the Operational Administrator of a large Taft-Hartley fund. Since joining LRWL over 4 years ago, he has participated in five public pension retirement system activities that have included RFP development, oversight project management, and quality assurance. He has first-hand experience with the products and implementation methodologies of several pension solution providers. He has supported KYTRS, MSPERS, and ERSRI and SLOCPT in exactly the same role as he will play with BERS. *He will be the day-to-day, on-site OPM consultant at BERS.*

**Mr. John Van Dunk**, Senior Consultant, has 33 years of experience, the preponderance of which has been as a senior consultant / project manager supporting system development and conversion initiatives on behalf of a wide array of defined benefit, defined contribution pension, insurance, and savings plans. He brings to his assignments well-honed skills in the areas of system assessment, functional requirements definition, options analysis, gap analysis, scope definition, solution design and integration, testing, and data conversion – as well as an overall expertise in IT and project planning, project scheduling, project oversight and management, and staff development. His public pension clients have included NYCERS, NYCBERS, SJORS, VIGERS, PRGERS, and Baltimore Employees Retirement System. *His familiarity with PTG – its approach and product – makes him a valuable resource to be called upon as needed.*

**Mr. Will Morrow**, Project Manager / Senior Consultant, has almost 32 years of experience as a management consultant and technology executive, leading and guiding IT professionals in private and public sector settings. Since joining LRWL over 11 years ago, he has brought to his assignments extensive technical and business expertise, and the capability to implement and adapt architectures for Web-based technology solutions, and effective management approaches that promote and measure IT investment relevance and performance. Most recently, he has focused on project management responsibilities for major technology initiatives in the public retirement environment. Will's expertise in supporting over 18 projects encompasses IT strategy and planning; project planning, control, and performance measurement; information system design, development and support; management of customer-vendor relationships; organizational guidance during technology transformations and business process reengineering.



Clients include SamCERA, CalSTRS, MDSRA, MOPSRs, and OHPERS. *Will can be called upon if there are technical issues that need to be addressed.*

**Mr. Peter Cole, PMP**, Project Manager / Senior Consultant, has over 19 years of retirement experience supporting over 39 public employee retirement systems (pensions, insurance, and benefits) since joining LRWL over 14 years ago. He is particularly adept at developing precise RFPs and facilitating other procurement related efforts to include requirements definition and implementation oversight. His clients include MEPERS, MATRS, NHRS, NYSLRS, VTRS, WIETF, KYTRS, WVCPRB, ILTRS to name but a few. His specialty is in the area of imaging – having worked on over three dozen such projects in the public pension environment. *He is available to address any areas related to imaging.*



### 3. APPROACH

**Describe your understanding of the services covered in this RFP.  
Please provide BERS with a detailed description (maximum of two pages) of your firm's approach to this project.  
Identify the clients where the proposed approach has been used.**

We understand the services that BERS has identified in this RFP. They include the following: assist in overseeing the implementation of the new Benefits Administration System (BAS) by assisting BERS in the overall management of the project including team management and collaboration, project planning, tracking results, facilitating testing and training, and reporting project status.

All the references provided in Table 3 – LRWL References have utilized our Oversight Project Management capabilities. While we have limited the number of client contact information to 12 clients, we would be happy to extend that number to 100% of our entire client base. Our goal is *“To assist public retirement systems in meeting the expectations of their customers.”* Additionally, our goal is to assure that BERS’ Board of Trustees and BERS management and staff’s expectations are fully met.

**Our team has performed this service on 50 similar contracts.** Our team is very skilled and experienced in delivering these services. In addition to meeting the requirements above, our firm has delivered the following related services during the OPM phase of various projects:

- Oversight project management
- Liaison and coordination between the BAS solution provider and the client
- Monitoring and reporting on deliverables and costs as well as potential problems
- Coordinating work plans and project phasing
- Ensuring quality of deliverables
- Issues tracking and escalation
- Risk Management services
- Recommending modifications and refinements to the scope, schedule, approach, budget, and phasing of the project
- Evaluation of the performance of the selected BAS vendor
- Collaborate extensively with client staff on any and all related business process modifications necessary to implement the project including recommendations on organizational changes
- Facilitating test planning, test script development, extensive testing, test reporting, etc.

As requested in the RFP, LRWL plans to provide all of the services identified, plus those that we know are required and which are described in the **OPM<sup>ANAGEMENT</sup> Tools<sup>®</sup>** in Attachment 3. This will include a ½ FTE, on-site project manager to:

- Develop/maintain/review the work plan
- Develop/maintain/review status reports
- Facilitate all requirements, design, test, and training activities
- Participate in all appropriate meetings – requirements confirmation, design reviews, test planning, data analysis, data conversion – to ensure that all appropriate topics and best practices are addressed



- Develop/maintain/review issues tracking logs
- Develop/maintain/review risk tracking logs
- Ensure the success of the project: On time, On scope, On budget, and On quality

Deliverables will include:

- Provide on-site support
- Review compliance with the project schedule
- Ensure risks and issues are being properly managed
- Review of requirements specifications and designs
- Facilitate development of and execution of testing
- Develop and ensure compliance with acceptance criteria
- Participate in project status meetings
- Deliver bi-weekly and monthly written status reports.

Objectives to be supported include:

- OPM will ensure contract estimates of all required resources, including human resources, equipment products, and the services supplied for each item. These aspects that need to be estimated are: quality, time, cost, and price are compared and measured to the budget, and the written contract.
- The OPM will consider the following when estimated resources: 1. What are the risks? 2. What tools can be automated, and streamlined to optimize workflow? 3. Is the implementation plan sufficiently detailed? 4. Are the requirements fully defined?
- OPM will be responsible after the plan is clearly defined to ensure time scheduling is achieved by defining the Critical Path of the project, and balance the human resources required to complete this project in an agreed-upon time frame.
- OPM will ensure the multi-phase implementation completes adequate testing, tuning activities, on-site support, clearly defines training requirements, documents tasks, initial support requirements, and includes hand-over to staff.
- OPM will work with City, and PTG to elevate the overall level of customer service. The goal of the team: provide the ability of vested / active employees, and retirees the tools that automate desired changes; perform what-if scenarios on future benefits, and make routine inquiries to their retirement record.
- OPM will clearly define the roles and responsibilities of PTG, OPM, and City staff.
- OPM will clearly define tasks, sub-tasks, activities, effort, and skills required to complete this project, and create a milestone list that will require buy-in, and approval of City staff.
- The schedule by Stage / Phase and Major Tasks of this project will require the OPM to produce an agreed-upon Milestone List within six weeks of the start of the project.



## 4. REFERENCES

Please provide information for three (3) references of current or recent clients similar in size and nature to BERS, for whom the firm is providing or has provided similar services. For each reference, please include client name, address, the telephone number and name of a contact person, and description of service provided.

We provide the following references as requested. All 12 include activities identical to those requested by BERS.

We have also provided letters of reference in Attachment 4 and 1 page project descriptions in Attachment 1 for all of the cited projects below.

**Table 3 - LRWL References**

System	Participants (000)	Contact Information
<b>Alameda County Employees' Retirement Association</b>	20.1	Kathy Foster Assistant Chief Executive Officer 475 14 <sup>th</sup> St., suite 1000 Oakland, CA 94612 kfooster@acera.org (510) 628-3000
<b>City of Austin Employees' Retirement System</b>	11.5	Russell Nash Deputy Executive Director 418 D. Highland Mall Blvd. Austin, TX 78752 <a href="mailto:Russell.Nash@coaers.org">Russell.Nash@coaers.org</a> (512) 458-2551
<b>Baltimore City Employees Retirement System</b>	19.2	Roselyn Spenser Executive Director 7 East Redwood St, 13th Fl Baltimore, MD 21202-1904 <a href="mailto:rspencer@BCERS.org">rspencer@BCERS.org</a> (443) 984-3214 x204
<b>The Retirement Services Department City of San Jose</b>	11.2	Roberto Pena Executive Director 1737 North First Street, Suite 580 San Jose, CA 95112 <a href="mailto:robert.pena@sanjoseca.gov">robert.pena@sanjoseca.gov</a> (408) 794-1000
<b>Denver Employees Retirement Plan</b>	19.3	Steven Hutt Executive Director 77 Pearl Street Denver, CO 80203 <a href="mailto:shutt@derp.org">shutt@derp.org</a> (303) 839-5419
<b>Fairfax County Employees' Retirement System</b>	22.4	Jeanne Carr Executive Director 8001 Forbes Place, Suite 300 Springfield, VA 22151 <a href="mailto:Jeanne.carr@fcps.edu">Jeanne.carr@fcps.edu</a> (703) 426-3900





System	Participants (000)	Contact Information
<b>Los Angeles Fire and Police Pensions</b>	25.8	Ray Ciranna General Manager 360 East Second Street, Suite 400 Los Angeles, CA 90012 <a href="mailto:ray.ciranna@lafpp.com">ray.ciranna@lafpp.com</a> (213) 279-3015
<b>Milwaukee Employees Retirement System</b>	26.8	Martin Matson Former Deputy Director (Currently City Comptroller) Office of the Comptroller 200 E. Wells St., Room 404 Milwaukee, WI 53202-3546 <a href="mailto:mmatson@milwaukee.gov">mmatson@milwaukee.gov</a> (414) 286-3321
<b>Employees' Retirement System of Rhode Island</b>	58.3	Zachary J. Saul Director of Finance Employees Retirement System of Rhode Island 50 Service Avenue Warwick, RI 02886 <a href="mailto:zsaul@ersri.org">zsaul@ersri.org</a> (401) 462-7625
<b>San Diego City Employees' Retirement System</b>	20.2	David Bond Chief Information Officer San Diego County Employees Retirement System 401 West A Street, Suite 400 San Diego, CA 92101 <a href="mailto:Dbond@sdcers.org">Dbond@sdcers.org</a> (619) 525-3647
<b>San Luis Obispo County Pension Trust</b>	4.8	Carl Nelson Executive Secretary and CIO 1000 Mill St. San Luis Obispo, CA 93408 <a href="mailto:cnelson@co.slo.ca.us">cnelson@co.slo.ca.us</a> (805) 781-5465
<b>Tacoma Employees' Retirement System</b>	5.6	Cathy Marx Financial Supervisor 3628 S. 38 <sup>th</sup> Street Tacoma, WA 98409 <a href="mailto:cmarx@cityoftacoma.org">cmarx@cityoftacoma.org</a> (253) 502-8655



## 5. COSTS

**Bidding Vendors must submit a detailed cost schedule that identifies all costs for accomplishing the services outlined in this RFP. The cost schedule should clearly identify and break out all cost components. Please provide hourly rate(s) and an estimate of the hours expected to be applied to provide the services requested.**

Based on PTG's proposed implementation plan of 4 months 13 days, we provide the following cost estimate; we base it on 5 months – assuming that BERS will want some support post go live.

80 hours per month (1/2 FTE) for 5 months = 400 hours

400 hours \* \$225/hour = \$90,000

The hourly rate is all inclusive – it includes all travel expenses.

We will invoice BERS monthly for services along with a written status report in a mutually agreeable format describing activities during the month, issues, and plans for the subsequent month. Terms are net 30 days.

If additional support is needed during the scheduled five months or beyond, LRWL staff are available at the same hourly rate as above. We would mutually agree on the scope of such an effort and execute a contract amendment.