



STATE OF WISCONSIN
Department of Employee Trust Funds
A. John Voelker
SECRETARY

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September 21, 2023

Bryce Haws, SVP of Sales & Marketing
Linea Solutions
4551 Glencoe Ave., Suite 140
Marina del Rey, CA 90292

Subject: Notice of Intent to Award a Contract under RFP ETC0051 Strategic Partner for Pension Administrative System

Dear Mr. Haws,

On September 21, 2023, the State of Wisconsin Employee Trust Funds Board (Board) granted authority to the secretary of the Wisconsin Department of Employee Trust Funds (ETF) to issue an intent to award a contract on behalf of the Board to Linea Solutions to consult as a Strategic Partner for a Pension Administration System for a five-year period beginning on January 1, 2024 through December 31, 2028, with an option to renew the contract for two additional two-year periods, subject to successful contract negotiations. The bid abstract for this solicitation is on the following page.

Due to the time sensitive nature of an executed contract, the Board approved that in the event of failed or prolonged negotiations with Linea Solutions, the secretary be allowed to commence contract negotiations on behalf of the Board with The Segal Company.

RFP ETC0051 Section 3.10 describes the Board's policy for vendor procurement appeals. Appeals of the Board's intent to award a contract must be made in writing and according to the Board's Policy for vendor Procurement Appeals located at: <https://etf.wi.gov/boards/governance-manual/policies-procedures/download?inline=>

This letter is only a notice of intent to contract and does not constitute a contractual commitment.

Respectfully,

Joanne Klaas

Joanne Klaas
Contracts Specialist-Advanced
Wisconsin Department of Employee Trust Funds
Email: ETFSMBProcurement@etf.wi.gov

cc: - All proposers
- RFP Evaluation Committee
- ETF Procurement File, ETF Secretary's Office, ETF Office of Legal Services

Table 1 – General, Technical, and Initial Cost Scores

RFP ETC0051 Initial Scoring				
	Ernst & Young	Linea	Provaliant	Segal
General Score (300 pts)	192.00	189.83	178.50	205.00
Technical Score (500 pts)	259.25	303.85	216.43	297.79
Cost Score (200 pts)	200.00	170.66	193.54	140.80
(Gen+Tech+Cost) Score	651.25	664.34	588.47	643.59

After initial scoring was completed, the overall ranking was:

1. Linea: 664.34 total points
2. Ernst & Young: 651.25 total points
3. Segal: 643.59 total points
4. Provaliant: 588.47 total points

Best and Final Offers (BAFO) were requested from all four vendors.

Table 2 – General, Technical, and BAFO1 Cost Scores:

RFP ETC0051– Scores with BAFO1				
	Ernst & Young	Linea	Provaliant	Segal
General Score (300 max)	192.00	189.83	178.50	205.00
Technical Score (500 max)	259.25	303.85	216.43	297.79
Cost Score (200 max)	200.00	165.02	107.11	194.02
(Gen+Tech) + BAFO1 Score	651.25	658.70	502.04	696.81

After the BAFO1 was scored, the overall ranking was:

1. Segal: 696.81 total points
2. Linea: 658.70 total points
3. Ernst & Young: 651.25 total points
4. Provaliant: 502.04 total points

The evaluation committee elected to invite the top two scoring vendors at this point to submit a second BAFO.

Table 3 – General, Technical, and BAFO2 Cost Scores – Final Scores:

RFP ETC0051 – Scores with BAFO2		
	Linea	Segal
General Score (300 max)	189.83	205.00
Technical Score (500 max)	303.85	297.79
Cost Score (200 max)	200.00	177.22
(Gen+Tech)+BAFO2 Score	693.68	680.01

After the BAFO2 was scored, the overall ranking and final scores were:

1. Linea: 693.68 total points
2. Segal: 680.01 total points

Notes:

One of the Board’s primary responsibilities, as stated in [Wis. Stat. § 40.03\(1\)\(c\)](#), is: [the Board] “Shall appoint the secretary of the department and *may employ or select any medical, legal and other independent contractors as are required for the administration of the fund.*”

The Board is not required to award contracts to the highest scoring proposer or the lowest cost proposer.