**ATTACHMENT A**

**SOLICITATION NO. 5150000013**

This Solicitation is a Contract Document and is a request for proposal in connection with the Contract awarded by the Office of Management and Enterprise Services as more particularly described below. Any defined term used herein but not defined herein shall have the meaning ascribed in the General Terms or other Contract Document.

**PURPOSE**

The Contract is awarded on behalf of the Oklahoma Public Employees Retirement System (OPERS) for an experienced service provider to perform a gap analysis for needed and recommended functionality for process improvement and assistance in developing a road map for digitizing and modernizing the agency’s systems and processes to align with its strategic objectives. This will include, but is not limited to, a pension administration solution, a defined contribution plans administration solution, service and communication channels, and systems related to internal processes and data storage.

**BACKGROUND**

The Oklahoma Public Employees Retirement System (OPERS) was established in 1963, pursuant to 74 O.S. §901, to provide an orderly means for certain state and local government employees to retire from active service without prejudice and without inflicting undue hardship upon the retired employees; to enable such employees to accumulate deferred income reserves for themselves and their dependents to provide for old age, death, and inactive service, and for the purpose of effecting economy and efficiency in the administration of governmental affairs. To effectuate these purposes, OPERS serves as the administrator of the following tax-qualified retirement plans: the Oklahoma Public Employees Retirement System (a defined benefit plan, authorized by 74 O.S. §901, et seq., benefiting certain state and local government employees); the Uniform Retirement System for Justices and Judges (a defined benefit plan, authorized by 20 O.S. §1101, et seq., for state justices and judges); the Pathfinder Plan (a defined contribution plan, authorized by 74 O.S. §935.1, et seq., benefiting certain state employees); and the SoonerSave Plans (voluntary defined contribution plans, authorized by 74 O.S. §1701, et seq., benefiting certain state employees). The Oklahoma Public Employees Retirement System also provides financial and retirement planning education resources and services to Oklahoma’s public employees. The agency functions encompass the following divisions: Administration, Member Experience, Finance, Information Technology, and Benefit Administration and has a budgeted staff of 61 employees. The Executive Director is the chief administrative officer of the agency.

OPERS is administered by a Board of Trustees composed of 14 members including a member of the Corporation Commission or the Commission's designee selected by the Corporation Commission, the Director of the Office of Management and Enterprise Services or the Director's designee, the State Insurance Commissioner or the Commissioner's designee, the Director of Human Capital Management of the Office of Management and Enterprise Services, a member of the Oklahoma Tax Commission selected by the Tax Commission, the State Treasurer or the Treasurer’s designee, three members appointed by the Governor, one member appointed by the Supreme Court, two members appointed by the Speaker of the House of Representatives and two members appointed by the President Pro Tempore of the State Senate.

**1.** **Contract Term and Renewal Options**

The initial Contract term, which begins on the effective date of the Contract, is one year and there are five (5) one-year options to renew the Contract.

**2.** **Mandatory Requirements**

The parties agree to the following terms in addition to obligations set forth in other Contract Documents:

**Services include:**

1. Thoroughly assess the current OPERS Pension Administration System, the OPERS document management system, and additional programs required to perform the full scope of business operations and identify unique features or functionality required for OPERS to adhere to laws, policies and plan rules
2. Assess alignment of current business processes and rules with the agency’s strategic objectives
3. Identify practices that differentiate OPERS from other pension administration organizations similar in size and scope
4. Assess data integrity and security
5. Present options to OPERS for consideration
6. Recommend the best option for OPERS to pursue
7. Project management and advisory oversight during the assessment and implementation phases

**Key Deliverables include:**

1. A detailed functional and technical evaluation of our existing systems and processes, with respect to their ability to meet long-term business needs
2. A formal, multi-year plan/roadmap for utilizing existing systems, new solutions and technologies, to improve processes and modernize and digitize the engagement experience of members and employers
3. Ongoing consultation and evaluation services during implementation of the plan adopted by OPERS, including but not limited to providing expertise in supplier selection and in the procurement process for suppliers and service providers