### OP&F Offerors' Teleconference Questions

<table>
<thead>
<tr>
<th>No.</th>
<th>Offeror’s Question</th>
<th>OP&amp;F Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Can OP&amp;F say more about the current state of your data? When was the last time it was cleansed? Are there data-control validations in place to ensure quality as data is being keyed or uploaded into the system? Do you use a rules engine to test data quality?</td>
<td>Data was migrated and validated during an upgrade implementation with the current pension administration system vendor in 2013. There are rules built into the current system to maintain data integrity during data entry and data imports. Data is reviewed/audited both internally via reporting and externally via data export. Any data in an unexpected state is corrected either manually or via data scripts.</td>
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<td>2</td>
<td>Will OP&amp;F staff be available for manual data repair identified through data validations or is Offeror required to provide resources for data repair?</td>
<td>The Offeror is responsible for data repair identified through validation.</td>
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<td>3</td>
<td>As this section is labeled Special Contract Terms, are these the entire Terms &amp; Conditions for the contract or are there additional terms or conditions? While the Offeror may agree in principle or in part to the terms provided, is it expected that if the Offeror would seek adjustments to the specific verbiage that they provide a ‘disagree’ answer? Does a Disagree response to any item in this section disqualify the Offeror?</td>
<td>OP&amp;F has additional Terms and Conditions for the agreement. These are special terms OP&amp;F deems as high priority for this project. OP&amp;F prefers Offerors accept the terms, but would allow agreement in principle and negotiation of specific verbiage with a finalist. Disagreement with verbiage does not disqualify an Offeror but will be part of the assessment of bids.</td>
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<td>4</td>
<td>Given the challenges of printing a large job while our offices are closed due to the pandemic, would OP&amp;F be willing to waive the 12 hardcopy responses due to Covid-19 and allow for a completely digital submission?</td>
<td>OP&amp;F faces the same challenges and would appreciate the submission of the hardcopy response. OP&amp;F has used third party vendors for printing and mailing during this time if that is of assistance to you.</td>
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<td>5</td>
<td>Does OP&amp;F have specific end-user training requirements?</td>
<td>OP&amp;F does not have any specific end-user training requirements and would be willing to rely on the Offeror’s best practices for training.</td>
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<td>6</td>
<td>Is there a specific training approach desired? (Train the Trainer vs. Instructor-led?)</td>
<td>OP&amp;F would prefer instructor led training for LOB users and Train the Trainer for external stakeholders and employers.</td>
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<tr>
<td>7</td>
<td>What is the total number of employees that require training, and what are their roles? (super-user vs. regular end-users vs. IT staff)</td>
<td>OP&amp;F has approximately 150 employees who will require training. Of those 150 employees, the expectation is that there are 25 superusers, 25 IT staff, and 100 regular users.</td>
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</tbody>
</table>
8 Are there any external stakeholders that require training? (Employers, vendors)
   No, OP&F resources will train external stakeholders.

9 Is there any requirement for technical training for OP&F developers? If yes, how many resources it might be?
   Yes. We expect the vendor to advise us of the number of developers that will be needed.

10 Section 3.2 states that the current Kofax solution is to be retired. If it can be reused in the proposed new solution is acceptable to do so?
   Yes.

11 Regarding Section 3.4 Data Conversion Project, are there any current data issues that require processes to be executed outside the V3 application?
   Answered in #1.

12 Regarding Section 3.4 Data Conversion Project, are there currently any routine data fixes run to correct data recurring data problems?
   Answered in #1.

13 In Attachment 3, Section 29, the flexibility rating column is blank. Is this an oversight or how should we respond to this section?
   The flexibility rating column in Attachment 3, Section 29 should all be populated with values equal to 2 to represent Desired functionality.

14 Regarding the stated Minimum Qualification in Attachment A (A1, Page 1: ‘The Offeror must have three references of completed implementations of the equivalent Pension Administration System solution being proposed to OP&F. “Equivalent solution” is defined as either the same version of the application or one major version earlier and for funds with a pension plan and total membership size of at least 25,000 participants and beneficiaries and at least 250 participating employers. These references must be for North American pension administration clients that are no older than five years.’), our assumption is that clients with a current implementation/version upgrade installed within the last five years are acceptable references. Please confirm.
   Yes, clients with a current implementation/version upgrade installed within the last five years are acceptable references.
15 Regarding the stated Mandatory Requirement in Attachment A (A3, Page 223, Cybersecurity Requirement C08.03: “The Proposed Solution shall ensure OP&F Administrator or designee shall authorize or pre-authorize Offeror maintenance on hardware and systems. Offeror monitors, logs and maintains maximum possible monitoring and control during maintenance and diagnostic activities. OP&F be allowed access to all associated logs and diagnostic tools.’), in a complete managed service or SaaS-style offering, OP&F would not deem access to all associated logs and diagnostics tools a mandatory requirement. Please confirm.

Yes, in a complete managed service or SaaS offering access to associated logs and diagnostics is not a mandatory requirement.

16 Regarding the stated Special Contract Terms in Attachment A (A3, page 233, Special Contract Terms), would our proposal be valid if we take exception to the Special Contract Terms and conditions and assume that the parties negotiate in good faith based on Offeror’s base contract should Offeror be awarded the contract?

Answered in #3.

17 What is the estimated funding source, or budget for this project?

OP&F is self-funded with 15 billion in assets. The Board of Trustees approves the budget on an annual basis in October of each year.

18 Has funding been secured, or is that expected to take place at a later date?

Funding is secure. OP&F wishes to review the offers received in this RFP as the final part of its budgeting process.

19 Is this a new requirement? Or is there an incumbent vendor providing these services? If so, what is the contract number, vendor name, and term of the contract?

No. OP&F currently has a Pension Administration System provided by Vitech. The contract with Vitech is current.

20 Is there a timeline for when this project must be awarded?

The timeline is detailed in Section 4.11 of the RFP.